

# Project Spec Sheet: AI Content Creator upgrade feature within DisplayCRM

## Project Overview

The AI Content Creator is a module within DisplayCRM that leverages Retrieval-Augmented Generation (RAG) to generate marketing content from uploaded source documents. It supports generation of social media content, blog posts, case studies, and other formats, with adjustable filters and tone options.

## Goals

- Enable users to upload source materials (PDFs, Docs, etc.)
- Generate marketing content tailored to input documents
- Let users define generation filters like tone, audience, and content length
- Display multiple content options in card format
- Allow users to save and reuse generated content

## User Flow Overview

1. Upload Source Document
2. Select Content Type (e.g., Social, Blog, Case Study)
3. Adjust Generation Settings
4. Generate Options
5. Preview Outputs in Cards
6. Save or Export Selected Content

## Core Features & Components

Upload Zone:

- Drag & drop or browse to upload source documents
- File types: PDF, DOCX, TXT
- Upload confirmation with filename display

Top Action Area (Figma Frame #1):

- CTA Buttons: "Upload Document", "Generate Content", "Save All"
- Content type selector: Dropdown (Social, Blog, Case Study)

Filters & Content Settings (Figma Frame #2):

- Tone of Voice: Professional, Conversational, Playful, Bold, Technical, etc.
- Audience Type: B2B, Consumer, Executive, Technical, etc.
- Headline Length: Short, Medium, Long
- Body Length: Tweet-sized, Paragraph, Extended
- Keywords/Tags: Free-form input or suggested via AI
- # of Options: Numeric selector (1–10)

Output Display Area (Figma Frame #3):

- Results in card format with: Headline, body copy, tags, keywords
- Each card includes: "Copy", "Save", "Regenerate"
- Saved state visually indicated

### Backend Logic (RAG Environment)

- Indexed document content feeds retrieval layer
- Prompts tuned to user-defined filters
- AI model generates output using retrieved chunks + prompt injection
- Results cached per session to enable save/export

### Saving Functionality

- User can save:
  - Individual outputs
  - All generated options
- Saved content linked to user's project or CRM record

### File Delivery

Figma file includes 3 layout frames:

1. Action Area (upload + CTA)
2. Filter/Dropdown Controls
3. Card Layout for Output Display

### Stretch Features (Post-MVP)

- Editing interface for each card
- Export to PDF, .docx, or social-ready image
- Tag recommendations using keyword clustering
- AI voice assistant to walk users through generation

## Marketing Content Builder – Step-by-Step User Guide

### Powered by Variant, Built for DisplayCRM

This feature represents a collaborative development between **Variant** and **DisplayCRM**, designed to empower users with AI-assisted content creation using a flexible and intuitive interface. This guide walks through the four key stages of the builder.

## Screen 1: Initial Input Interface

**Purpose:** Begin a new content campaign by setting the parameters for AI-generated marketing content.

### ◆ Steps:

1. **Enter Campaign Name**
  - Internal-only field for organizing campaigns.
  - Will not appear in the generated social content.
2. **Choose Source Material**
  - Select from **Previously Uploaded Documents**, or
  - Use **Upload New Content** to drop in a fresh file.
3. **Set Content Filters**
  - **Content Type** – Social Post, Blog, Fact Sheet, Case Study
  - **Tone of Voice** – Playful, Professional, Bold, Calm
  - **Headline Length** – Short, Medium, Long, Or Auto (AI Decides)
  - **Body Length** – Same options as headline
  - **Custom Prompts** – Optional AI steering input
  - **# of Options** – How many variations to generate
4. **Click “Create”**

Generates content cards based on your input criteria.

The screenshot shows the 'Marketing Content Builder' interface, powered by Variant. At the top right, there is a link to 'view archives'. The main input area is a light gray box containing several fields and buttons. On the left, there is a text input field for 'Add Content Campaign Name (this will not be visible in the social content)'. To its right are two options: 'Read From Previously Uploaded Content' with a dropdown arrow, and 'OR Upload New Content' with a text input field. Below these are six buttons: 'Content Type' with a dropdown arrow, 'Tone of Voice' with a dropdown arrow, 'Headline Length' with a dropdown arrow, 'Headline Length' with a dropdown arrow, 'Add custom prompts' with a text input field, and '2 options' with a dropdown arrow. A blue 'Create' button with a right-pointing arrow is on the far right.

## Screen 2: Filter Dropdown Expanded

**Purpose:** Preview and refine content generation settings.

### ◆ **Highlights:**

- Expanded menus show the full range of inputs.
- All selections remain editable before clicking **Create**.

The screenshot shows the 'Marketing Content Builder' interface, powered by Variant. At the top, there's a header with the title 'Marketing Content Builder' and 'Powered by Variant'. Below this is a 'view archives' link. The main form area contains several input fields and dropdown menus. The 'Content Type' dropdown is expanded, showing options: 'Social Post', 'Blog', 'Fact Sheet', and 'Case Study'. The 'Tone of Voice' dropdown is also expanded, showing options: 'Playful', 'Professional', 'Bold', and 'Calm'. The 'Headline Length' dropdown is expanded, showing options: 'Short (Snappy)', 'Medium (Balanced)', 'Long (Descriptive)', and 'Auto (AI Decides Best Fit)'. The 'Headline Length' dropdown is also expanded, showing the same options. There are also input fields for 'Add Content Campaign Name (this will not be visible in the social content)', 'Read From Previously Uploaded Content', 'OR', 'Upload New Content', 'Add custom prompts', and '2 options'. A blue 'Create' button is at the bottom right.

## Screen 3: Output Display – Content Campaigns

**Purpose:** View and manage your generated marketing content.

### ◆ **Layout:**

- Each card includes:
  - **Headline**
  - **Post Copy**
  - **CTA**
  - **Hashtags**
  - Options to **Edit** or **Archive**

- Campaigns are timestamped and labeled for clarity.
- Top-right link to **View Archives** lets you browse past content.

## Marketing Content Builder [↗](#)

Powered by Variant

[view archives](#)

Read From Previously Uploaded Content ^
OR
Upload New Content

Content Type ^

Tone of Voice ^

Headline Length ^

Headline Length ^

Add custom prompts

2 options ^

Create +

### Content Campaigns

Campaign Name 1 | March 22
edit | archive

**Headline:**  
"Streamline Your Sales & Marketing Collateral in One Place"

**Post Copy**  
Tired of digging through siloed folders to find your latest proposal or case study? DisplayCRM brings your content together—beautifully and efficiently. Create tailored experiences for every audience with just a few clicks.

**CTA**  
Try Display CRM free today.

**Hashtags:**  
#MarketingTools #SalesEnablement #CRM #DigitalExperience

Campaign Name 2 | March 22
edit | archive

**Headline:**  
"Streamline Your Sales & Marketing Collateral in One Place"

**Post Copy**  
Tired of digging through siloed folders to find your latest proposal or case study? DisplayCRM brings your content together—beautifully and efficiently. Create tailored experiences for every audience with just a few clicks.

**CTA**  
Try Display CRM free today.

**Hashtags:**  
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## Screen 4: Ask AI to Refine

**Purpose:** Refine generated content using smart AI prompts.

### ◆ Features:

- Add instructions in plain language like:
  - *"Make this more casual"*
  - *"Include a benefit statement"*
  - *"Add emojis for social"*
- Click **Submit** and AI will provide revised copy within the same card structure.

Marketing Content Builder

Powered by Variant

view archives

Add Content Campaign Name ( this will not be visible in the social content)

Read From Previously Uploaded Content

OR

Upload New Content

Content Type

Tone of Voice

Headline Length

Headline Lenght

Add custom prompts

2 options

Create

Content Campaigns

Campaign Name 1 | March 22

edit | archive

Headline:

"Streamline Your Sales & Marketing Collateral in One Place"

Post Copy

Tired of digging through siloed folders to find your latest proposal or case study? DisplayCRM brings your content together—beautifully and efficiently. Create tailored experiences for every audience with just a few clicks.

CTA

Try Display CRM free today.

Hashtags:

#MarketingTools # SalesEnablement #CRM #DigitalExperience

Ask AI to make edits

Submit

Campaign Name 2 | March 22

edit | archive

Headline:

"Streamline Your Sales & Marketing Collateral in One Place"

Post Copy

Tired of digging through siloed folders to find your latest proposal or case study? DisplayCRM brings your content together—beautifully and efficiently. Create tailored experiences for every audience with just a few clicks.

CTA

Try Display CRM free today.

Hashtags:

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