UserTest Pro: From Test Creation to Insights

1. Welcome to UserTest Pro!

This document will guide you through every step of the unmoderated testing process — from creating your first test to managing responses, analyzing insights, and downloading reports — so you can start collecting valuable feedback from real users with ease and confidence.

2. Pre-requisites checklist:

- [x] You have a client login to UserTest Pro
- [x] You have a clear goal for your test
- [x] You've identified your target testers or demographics
- [x] Assets or prototype links (Figma, website, APK, etc.)
- [x] Sufficient credits in your account or billing method set up.

3. Overview:

Once you log in to your UserTest Pro client account, you will be directed to the Client Landing Page, which is designed to give you easy access to all the essential tools and insights you need for managing your user tests. The interface consists of 4 main tabs:

a. **Dashboard:** get a quick overview of your testing activity. Key features include: "Create New Test" button for launching tests instantly, summary of test performance and quick links to Responses and Insights.
b. **Tests:** View, manage, and organize all your tests. You can: create new tests, edit, inactive or delete existing tests, monitor test progress and status.
c. **Templates:** Access a library of ready-made test templates, or create your own custom templates.
d. **Responses:** Review user feedback and recordings by accessing individual tester responses, watching session videos, and downloading reports.

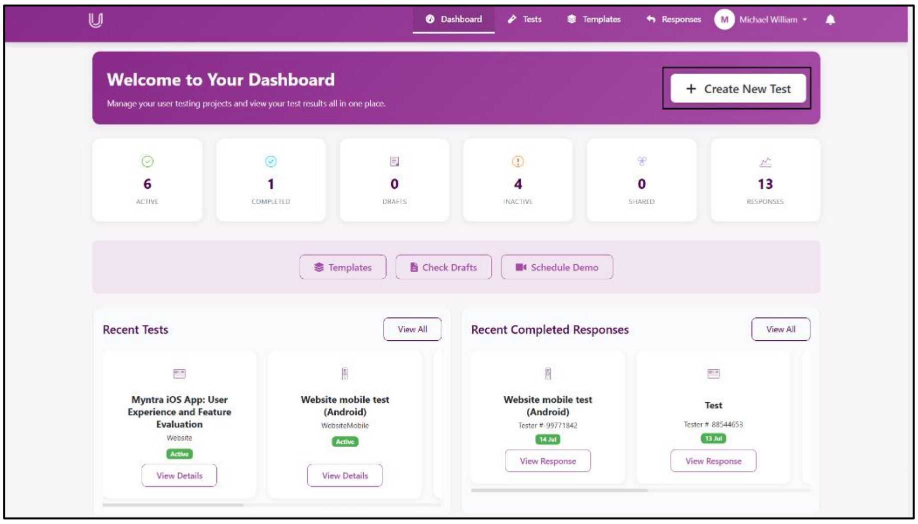
4. Unmoderated test:

Unmoderated tests on UserTest Pro are a flexible, efficient way to gather real user feedback without the need for real-time facilitation. Ideal for UX researchers, product managers, designers, marketers, founders, and educators, unmoderated testing allows you to create a structured test with predefined tasks and questions that participants complete independently, at their own pace. This method is especially useful when you're looking to test usability, user flows, feature comprehension, or visual design across a larger number of participants in a shorter time frame. After setting up your test including your goals, tasks, screener questions, and target devices you can choose to either recruit users from the UserTest Pro panel or use the Bring Your Own Testers (BYOT) feature to invite your own audience. Since there's no need to coordinate schedules or host live sessions, unmoderated tests are cost-effective, scalable, and time-saving, making them ideal for both rapid iteration and longitudinal studies. You can track progress in real-time, analyze insights through built-in tools, and download detailed reports to share with stakeholders. Whether you're launching a new feature or validating a design change, unmoderated testing empowers you to collect actionable insights - anytime, anywhere.

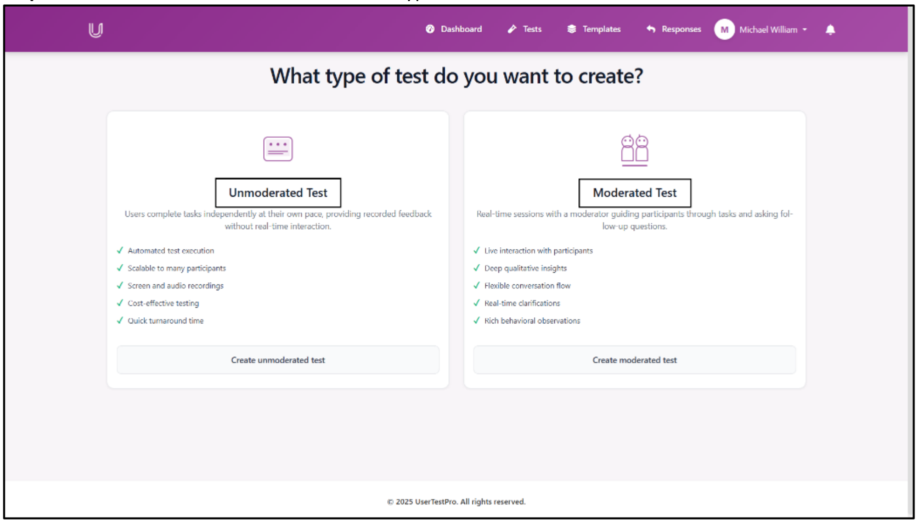
5. Quick navigation: UserTest Pro client guide:

6. Step-by-step: Creating a new test

Step 1: Click on **'Create New Test'** button to get started.



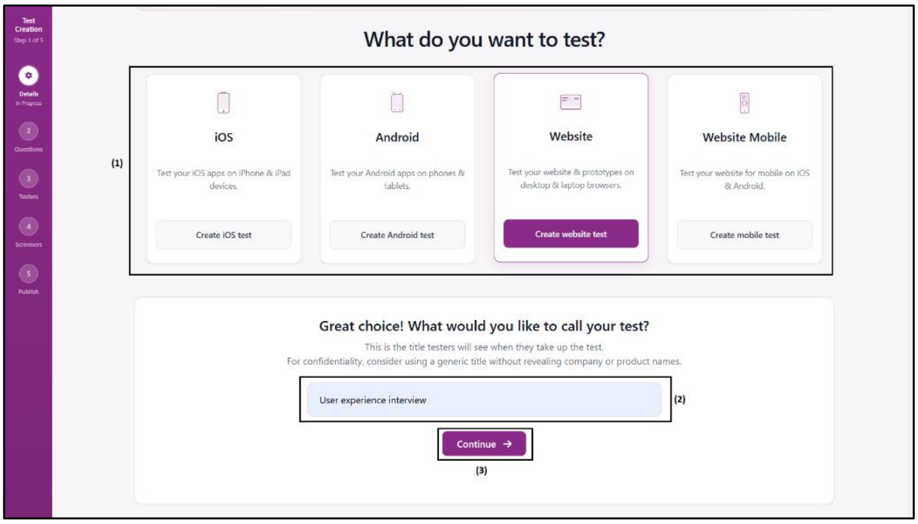
Step 2: Select **'Unmoderated Test'** as the test type.



Step 3: Select the **'Test device' (1)** based on your test type. Review the description provided for each device option to choose the most suitable one for your test. Enter the **'Test title/name' (2)** and click the **'Continue' (3)** button to proceed.

Test title/name: A clear and concise title that defines what part of the website/App/Prototype or experience is being tested. The **test name** should summarize the objective of the user test. It helps testers understand the purpose at a glance. Keep it short but informative. Include key elements such as the platform name and the focus of the test (e.g., usability, navigation, onboarding, conversion flow etc.,).

Note:
In general, avoid including the name of the app or product in the test name. This helps prevent unqualified testers from faking their way through the screeners. If they already recognize the app name, they might provide dishonest responses just to get selected, which can skew your results.



☑ **Best practices:**
Describe the purpose of the test in general terms:

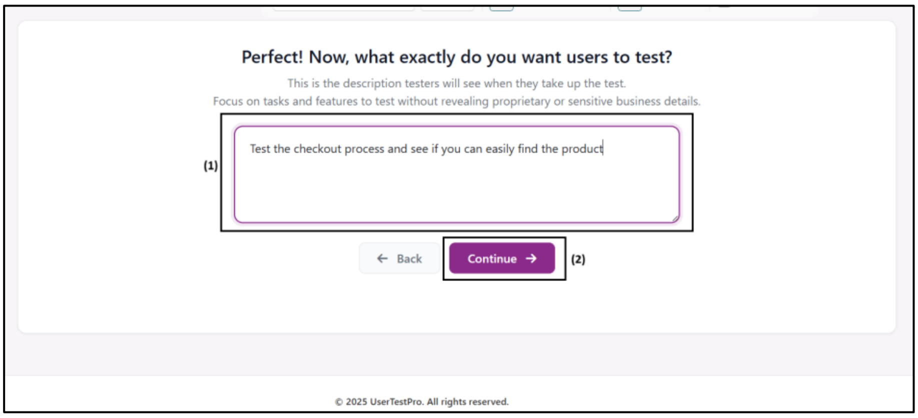
- Use references like "Mobile onboarding flow", "Checkout usability", or "Homepage navigation"
- Mention the platform (e.g., mobile app, desktop site) and focus area (e.g., usability, navigation, feature understanding) without naming the product.

Example – do's and don'ts:

Bad Practice (Avoid)	Good Practice (Recommended)
"Test for instapay App – Onboarding Flow"	"Mobile App – Onboarding Flow Usability"
"Zentro CRM – Dashboard Navigation Test"	"Web Dashboard – Navigation Task Flow"

Step 4: Enter the **'Test Description' (1)** and click the **'Continue' (2)** button to proceed.

Test description: A brief overview of what the test involves, what you expect the tester to do, and how their feedback will be used. A well-crafted test description helps set the right expectations, ensures tester engagement, and contributes to the overall quality and relevance of the collected responses.



Step 5: Enter the **'URL' (1)** and click the **'All set!' (2)** button to proceed.

URL: The Web/App/Protype link that testers should visit and interact with during the test. Ensure the URL is live, accessible, and not password-protected (unless you've given access).

- **Web URL:** A live, public-facing website or landing page.
- **Mobile app links:** If the app is already published, provide the direct Google Play or App Store link. This is the easiest and most reliable method for testers to access and install your app.
- **App (APK) link:** Upload the APK file to a cloud storage service (e.g., Google Drive, Dropbox) and paste the shareable link here.
- **Prototypes (Figma, Adobe XD, Invision, etc.):**

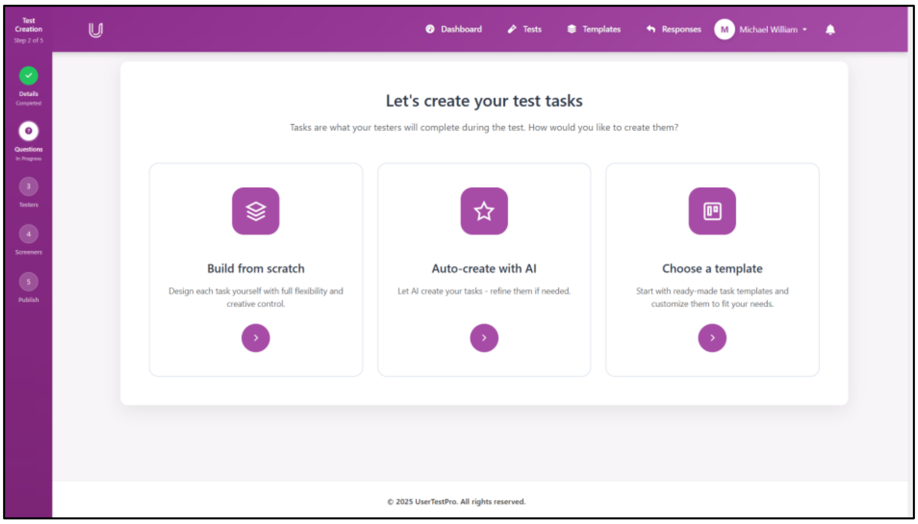
Publish your prototype (e.g., via Figma's share link).
Ensure the prototype link has 'Anyone with the link can view' permissions.
Paste the view-only link here.

☑ **Important guidelines:**

- Ensure the link is live and accessible.
- Do not submit links that are password-protected or require login, unless you've explicitly provided access credentials in the test instructions.
- For APK or Prototype files, do not attempt to upload the files directly. Always use cloud storage and share the accessible link.

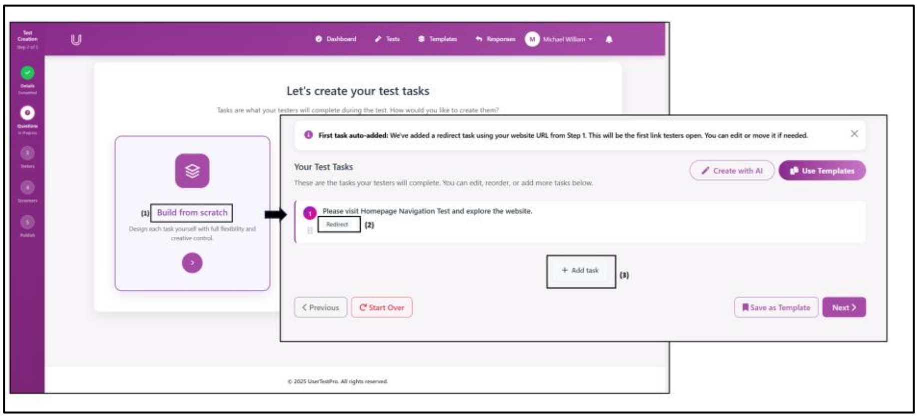
Step 6: Add questions - task creation options:
In this step, you'll define the tasks your testers will perform during the test. You have **3 flexible options** to create tasks, depending on your preference and experience level.

1. **Build from scratch:** Select this option if you want full creative control. You can manually write and structure each task exactly the way you want, giving you maximum flexibility in test design.
2. **Auto-create with AI:** Let our AI assist you by generating task suggestions based on your test title and goals. You can then review, edit, and refine these tasks as needed.
3. **Choose a template:** Pick from a library of ready-made task templates tailored to common use cases and industries. You can customize the selected template to better match your specific testing needs or create your own custom templates.



<u>**Option 1:**</u> Choose **'Build from scratch' (1)** to manually add your own questions. By default, the first task will be automatically created using the URL provided in **Step 5**, and will appear as a **'Redirect' (2)** task. This will be the first link that testers open.

Continue by clicking **‘Add Task’ (3)** to include more questions.

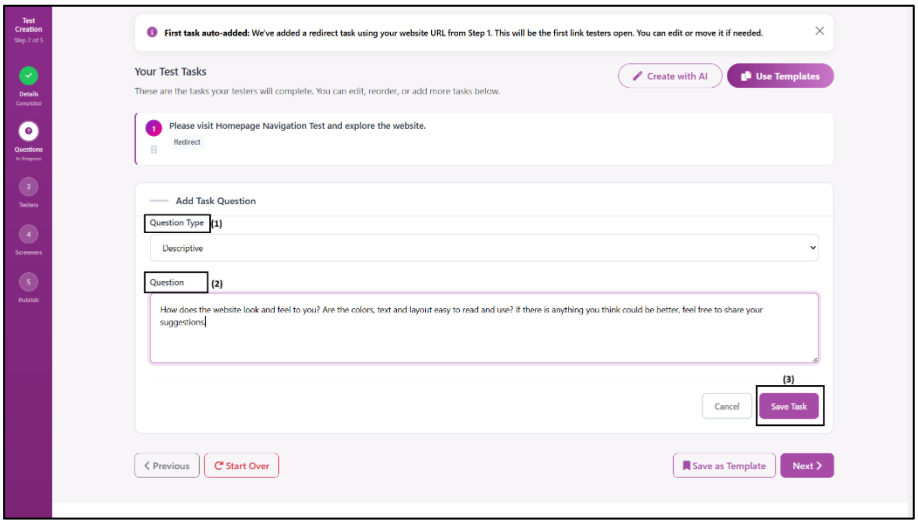


Select the **‘Question Type’** from the dropdown menu **(1)**. The platform supports the following types: Multiple Choice, Single Choice, Descriptive, Rating, Task-Based, and Redirect. Add your **‘Question or Task’ (2).** In this step, you'll enter the specific question or task that you want testers to perform or respond to. This could be an action-based task (e.g., navigating through your app or website), or a question to gather their feedback or opinion. Make sure each question is clear, concise, and encourages testers to think aloud as they interact with your product. Once done, click the **‘Save Task’ button (3)** to proceed.

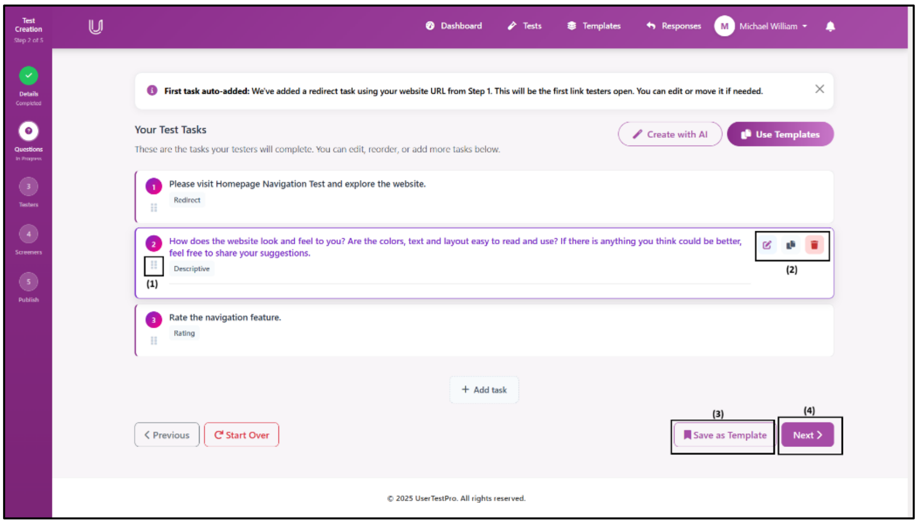
<u>Important:</u>

Your first question should always be of type ‘Redirect’. In this step, paste your Web/App/Prototype link into the URL field. This is the link testers will visit and interact with during the test. Please note, our system automatically adds a default prompt such as ‘Please visit xxyyzz.com’ in the question text. This is only a placeholder. It is important that you customize this message to align with your specific test scenario. For example, you might want to include instructions like ‘Explore the homepage and try locating the login button.’

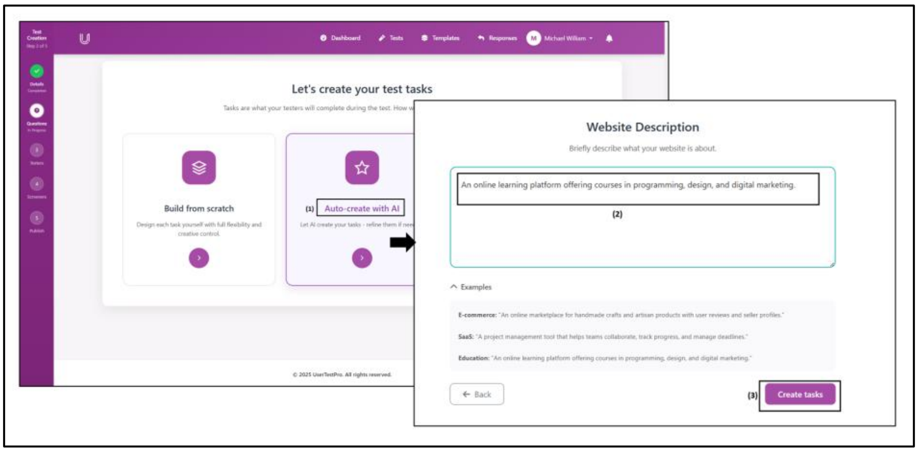
This helps set the right expectations for testers and ensures that their experience aligns with the research goals of your test.



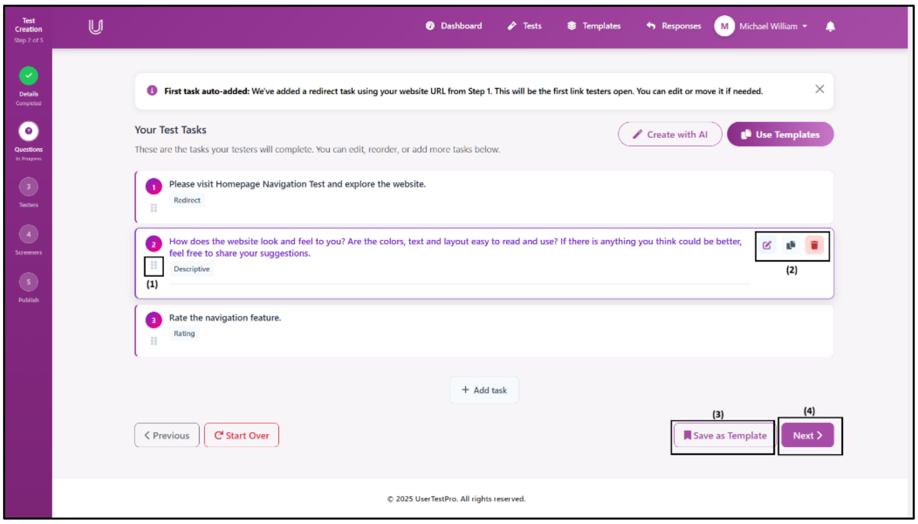
Once you have added all the questions/tasks, you can **rearrange** the tasks **(1)** or can **‘edit, duplicate, or delete’ (2)** the task if needed or **‘save the template’ (3)** for future use. When you're ready, click the **‘Next’ (4)** button to proceed to **Step 7**



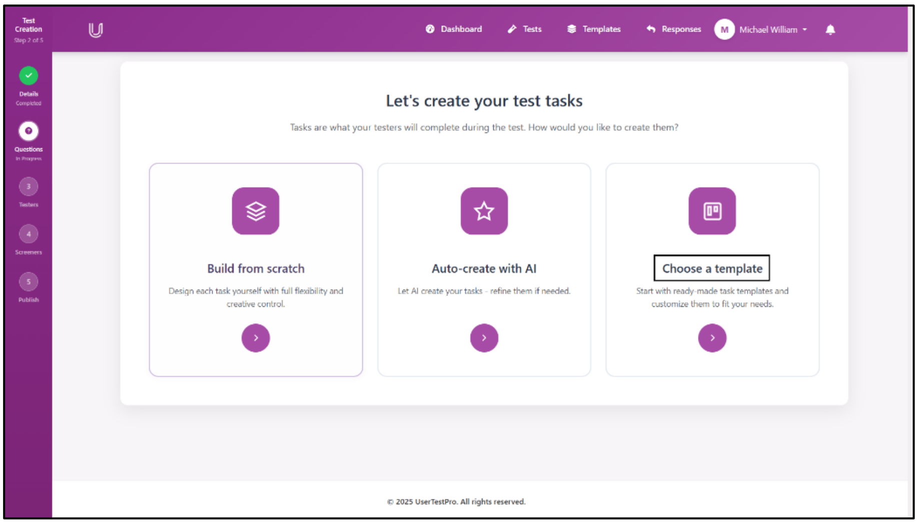
<u>Option 2:</u> Choose **'Auto-create with AI' (1)** to generate relevant questions and tasks with the help of AI. Briefly **'describe' (2)** what your app, website, or prototype is about, and then click the **'Create Tasks' (3)** button.



The AI will automatically generate a draft set of tasks, which you can **rearrange** the tasks **(1)** or can **'edit, duplicate, or delete' (2)** the task if needed or **'save the template' (3)** for future use. When you're ready, click the **'Next' (4)** button to proceed to [**Step 7**]

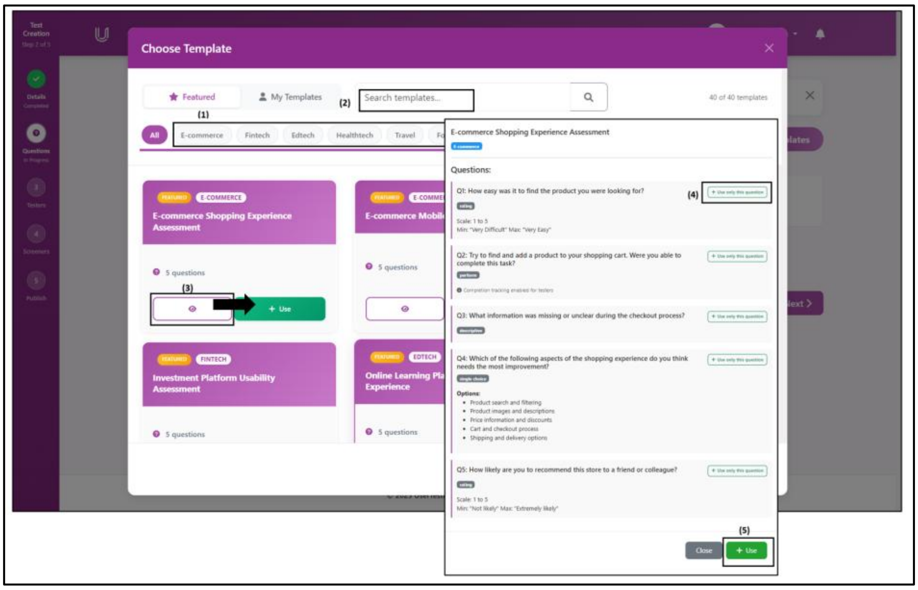


<u>Option 3:</u> Select 'Choose a template' option to use a ready-made test template from our library, based on your industry or test objective.



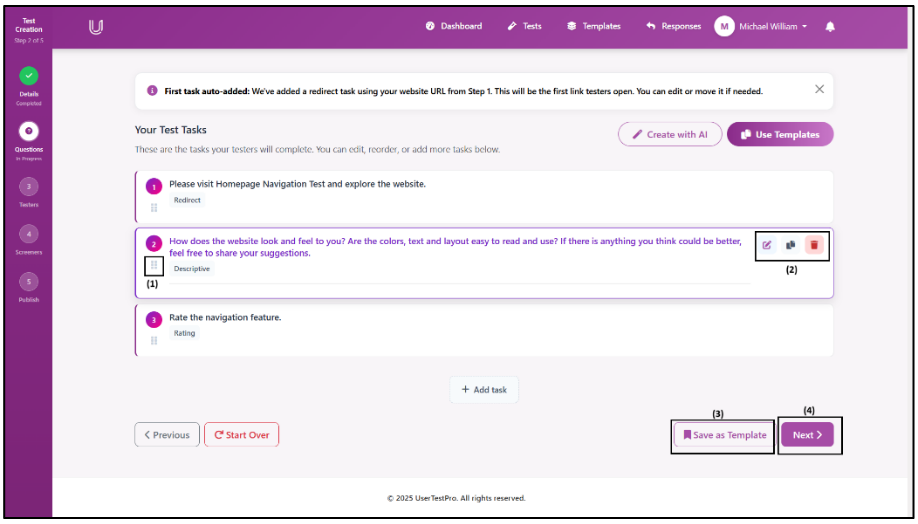
Choose a template based on your **industry type (1)**. You can also use the **search bar (2)** to quickly find a specific template.

Click **'Preview' (3)** to review the questions and tasks included in the template. If you wish to use only a specific question, select **'Use only this question' (4)**. If the entire template meets your requirements, click the **'Use' (5)** button to proceed.



Once the template questions are added, you can customize them to suit your preferences. You can **rearrange** the tasks **(1)** or can **'edit, duplicate, or delete' (2)** the task if needed or **'save the template' (3)** for future use. When you're ready, click the **'Next'**

(4) button to proceed to [**Step 7**]

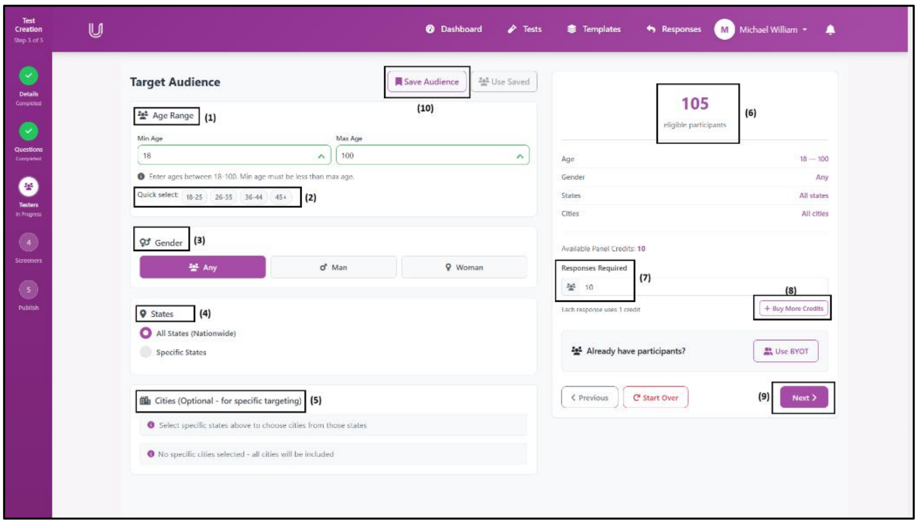


Step 7: Set Target Audience.
Select from our pool of verified testers on the UserTest Pro platform. By default, all age groups, genders, states, and cities are selected in the platform. To customize your tester demographics: enter the minimum and maximum **'Age Range' (1)** of the participants you want to include or use the predefined **'Quick Select' (2)** options for faster selection of common age ranges, choose the **'Gender' (3)** of participants for your test, select the geographical coverage by choosing **'States' (4)** either all states or specific states. Optionally, narrow down the selection further by choosing specific **'Cities' (5)** within the selected states.

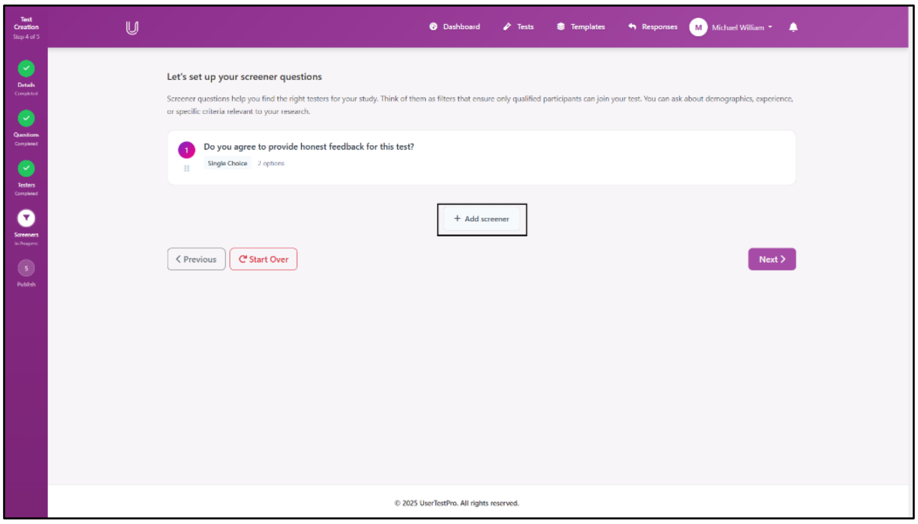
Once you have selected these criteria, the system will automatically display the number of **'Eligible participants' (6)** based on your target audience. Enter the number of **'Responses Required' (7)** for the test. Each response consumes 1 credit.

If you don't have enough credits for the required number of responses, click **'+ Buy More Credits' (8)** to purchase additional ones. For more information on pricing and credits, please visit our website: https://www.usertestpro.com/pricing

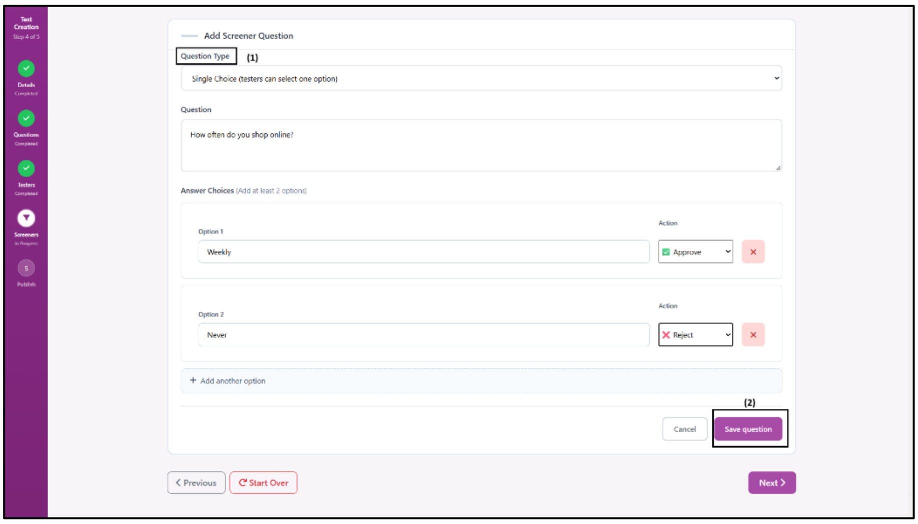
Click **'Next' (9)** to proceed to the **'Step 8'**. You can click **'Save Audience' (10)** button to save your current audience settings for future use.



Step 8: Add Screener Question. Click on **'+Add Screener'** button. This helps you filter and select the most relevant testers for your study. It ensures that only testers who meet specific criteria (e.g., behaviors, experiences, or preferences) are allowed to take part in your test. This is especially useful when you're looking for a niche or qualified audience.



Choose **'Question type' (1)** from the drop down, we offer 2 different types of questions – Single Choice & Multiple Choice. If you are new to screening questions, try stick to the Single Choice option. Once you add the screener question click the **'Save question' (2)** button.



☑ **How to choose the right one for your test:**

	Single Select	☑ Multiple Select
Best When	You want testers to choose **only one** valid answer.	You want testers to select **all answers that apply**.
Answer Logic	Options **rule out** each other	Options **can coexist**
Example	"What is your primary role at work?"	"Which of the following tools have you used before?"
Approval Rules	At least **one answer** marked '**Approve**'	At least **one answer** marked '**Approve**' or 'Reject' You can add **'Ignore'** for neutral answers
Pro Tips	• Avoid Yes/No type questions• Use when testers must meet **one** specific condition	• Use when **multiple criteria** must be met• Mark all qualifying answers as **'Approve'**
Good For	Narrow targeting by **single attribute** (e.g., experience level, job title)	Broader targeting with **multiple qualifiers** (e.g., tools used, platforms tested)

☑ **Answer validation in UserTest Pro:** To control who qualifies for your test, UserTest Pro offers 3 answer validation types:

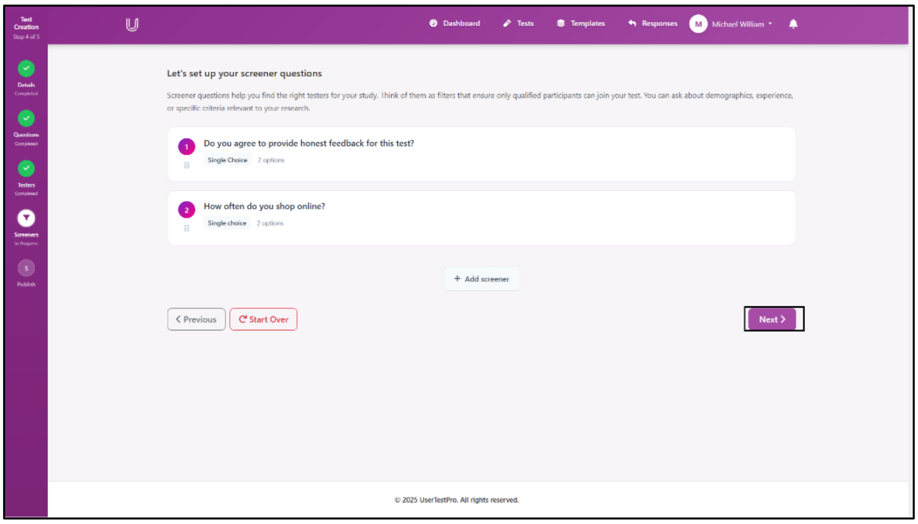
- Approve: The tester must choose this option to qualify. For Single Select, choosing any approved option passes and for Multiple Select, all approved options must be selected.
- Reject: Selecting this option will disqualify the tester.
- Ignore: Neutral option - neither qualifies nor disqualifies the tester.

Tips for better screening questions:

- Avoid Yes/No options - Testers tend to say 'yes' to qualify - use multiple choice for more accurate responses.
- Limit Answer Choices - Keep a balance between 'Approve' and 'Reject' options. Too many rejections can delay test completion or increase costs.
- Include 'None of the Above' - Helps include honest testers and prevents random guessing.

You can add multiple screener questions to ensure you're targeting the right participants. However, we recommend keeping screeners concise, ideally not more than 2 or 3. Adding too many screeners can limit your reach, as even a single incorrect answer will disqualify a participant.

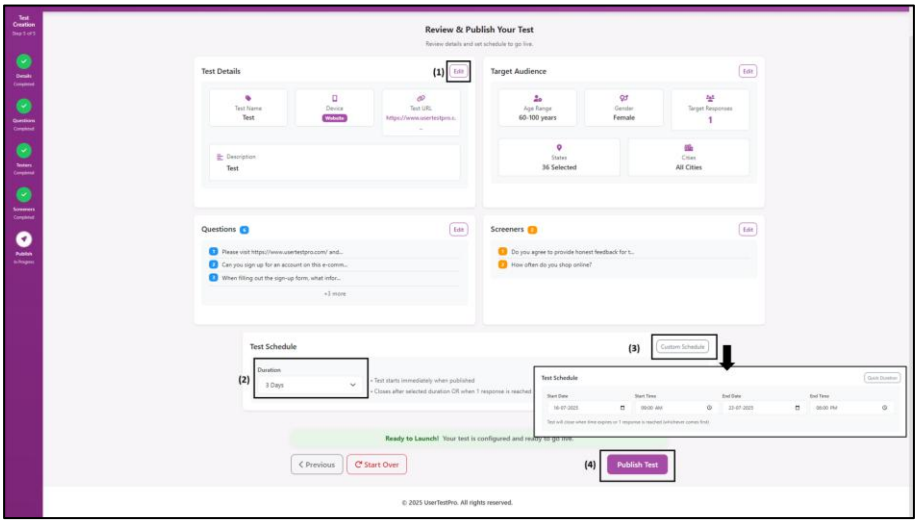
Once your screener questions are set, click the **'Next'** button to proceed.



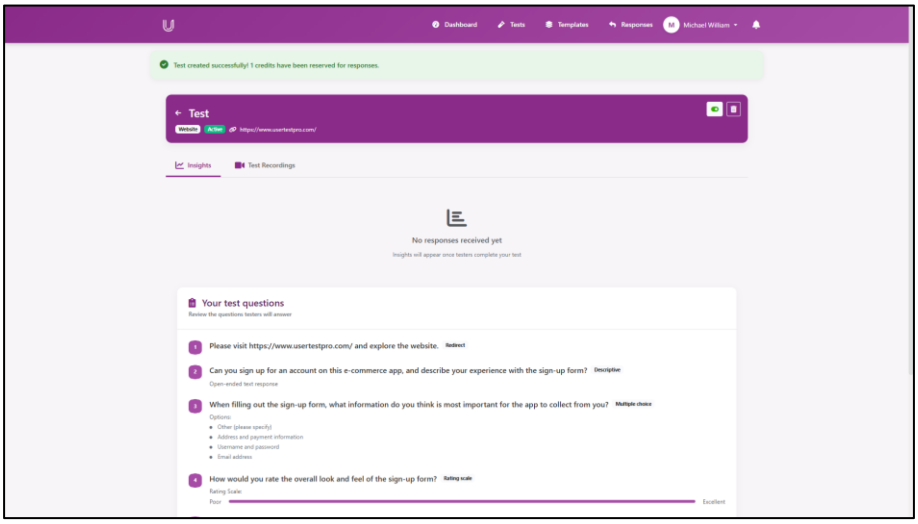
Step 9: Review & Publish your Test. This step is your final checkpoint before the test goes live to selected testers. It allows you to verify and confirm all the details you've configured across the previous steps. If changes are needed, use the **'Edit' (1)** buttons next to each section to make adjustments.

Set the **'Test Schedule' (2)** which defines how long the test will be available to participants. By default, tests are scheduled for 3 days on the platform. You can **'customize' (3)** the start and end dates based on your specific requirements.

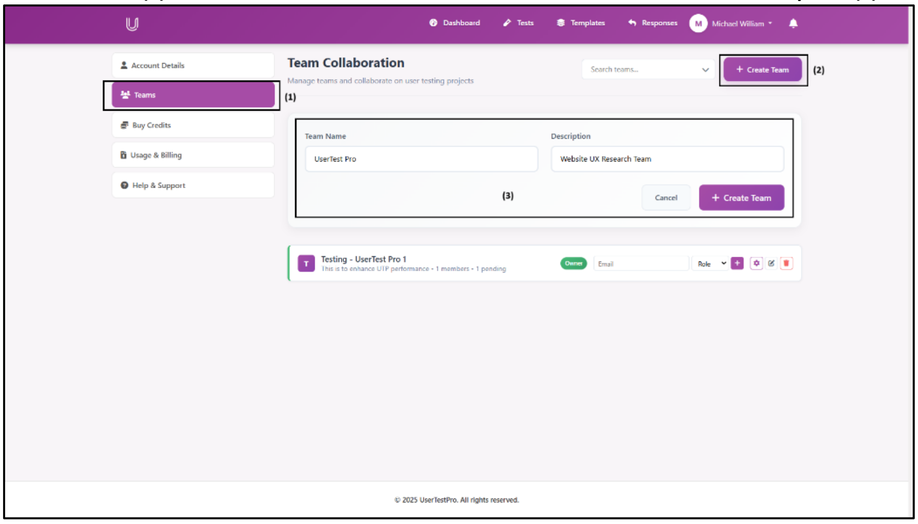
If everything looks good, click the **'Publish Test' (4)** button.



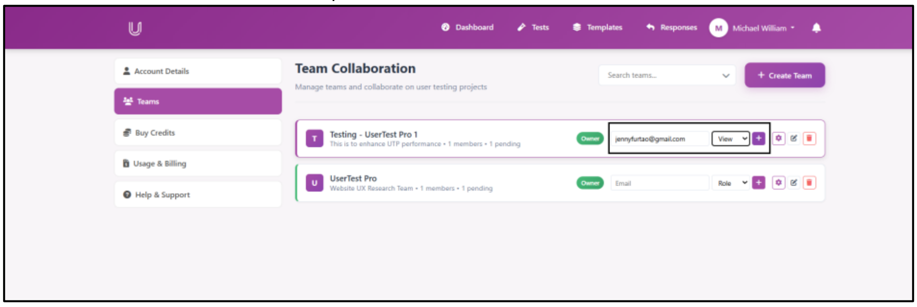
After publishing, you will be redirected to the 'Test Details' page, where you can monitor participant responses in real-time.



7. **Team collaboration:**
This section allows you to manage your internal teams and collaborate efficiently on user testing projects. To **'create a team' (2)**, click on **'Teams' (1)** under the Profile section, then enter the **'team name'** and a brief **'description' (3).**



Once you create a team, you can invite members to collaborate on user testing projects. Assign roles such as Admin, Member, or Viewer based on their level of access. After accepting the invite, members can access test details according to their assigned roles. This feature is especially valuable for product teams, UX researchers, designers, and stakeholders who need to work together on testing projects. It ensures smoother collaboration, role-based access control, and centralized tracking of test activities - all within one shared workspace.

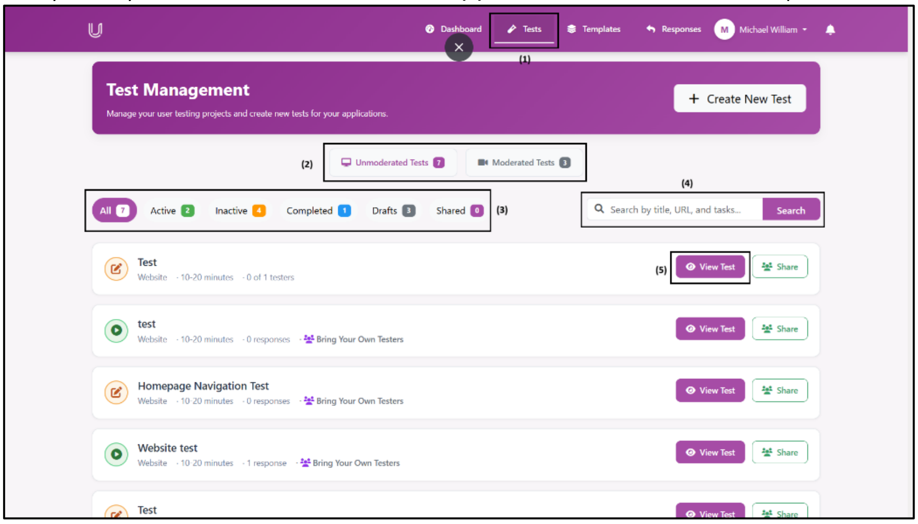


8. **Test management:**
Once your test is live and responses begin to come in, UserTest Pro offers a centralized dashboard to efficiently manage test responses, analyze user insights, and download detailed reports - helping you turn feedback into actionable improvements.

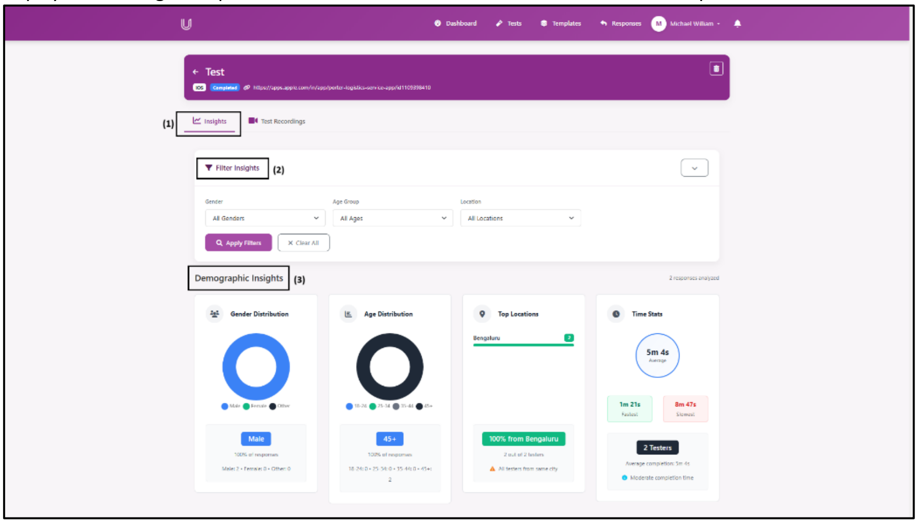
Step 1: Access Test Details:
Log in to your UserTest Pro Client account. From the Dashboard, click on the **'Tests' (1)** button to open the Test Management section. Here, you will see a list of all the tests you have created under **'Unmoderated Tests'** & **'Moderated Tests' (2)** section. Use filters such as **All Tests, Active, Inactive, Completed, or Drafts (3)** to refine your search. You can also use the **search bar (4)**

to quickly locate a specific test by name or URL.

Once you find your desired test, click the **'View Test' (5)** button to access its details and responses.

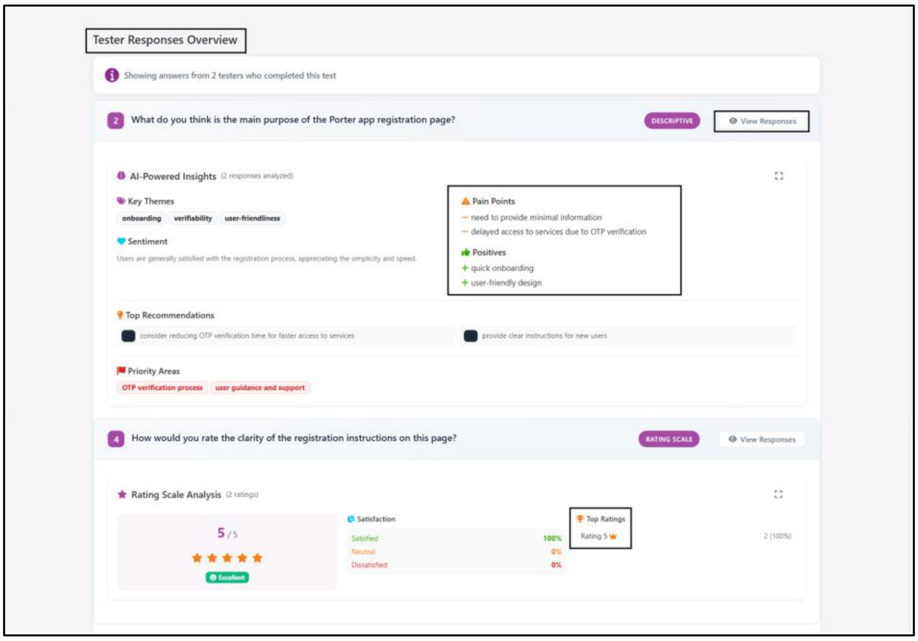


Step 2: Monitor test responses and insights:
After your test is live and responses are collected, go to the **'Insights' (1)** tab to view detailed analytics. You can filter the test results using the dropdowns under **'Filter Insights' (2)** to narrow down the data. **'Demographic Insights' (3)** provides a visual breakdown of who took your test such as gender distribution, age distribution, indicates the top cities your testers from and displays the average completion time of the test and number of testers who completed it.

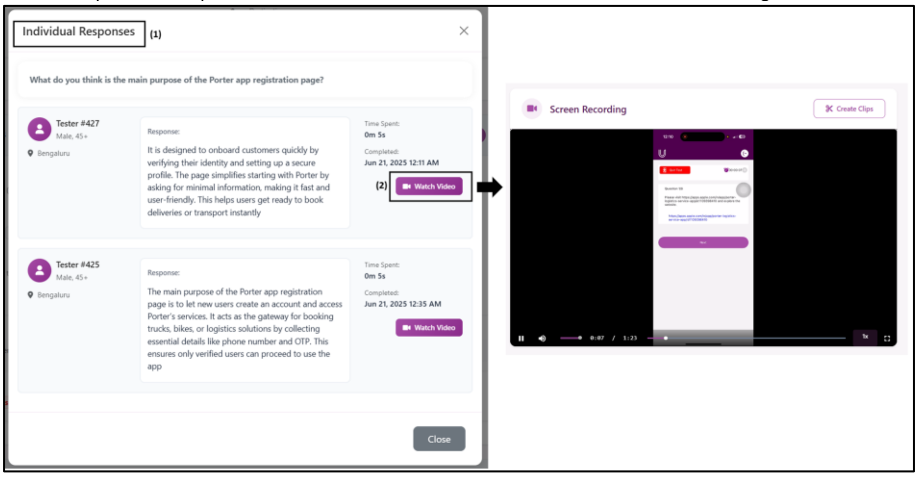


Tester responses overview:
After analyzing demographic insights, scroll down to the Tester Responses Overview section to examine individual feedback in detail. This section displays the actual responses from users who completed the test, highlighting both qualitative and quantitative data.

Click '**View Responses'** to see the original written feedback from each participant.



In the **'Individual Responses' (1)** section, you can review the answers provided by each tester for specific questions. To gain deeper context, click the **'Watch Video' (2)** button. This will directly take you to **'the exact point in the video'** where the tester was answering that specific question making it easier to observe their on-screen actions and thought process in real-time. This feature helps connect qualitative feedback with actual behavior for more actionable insights.



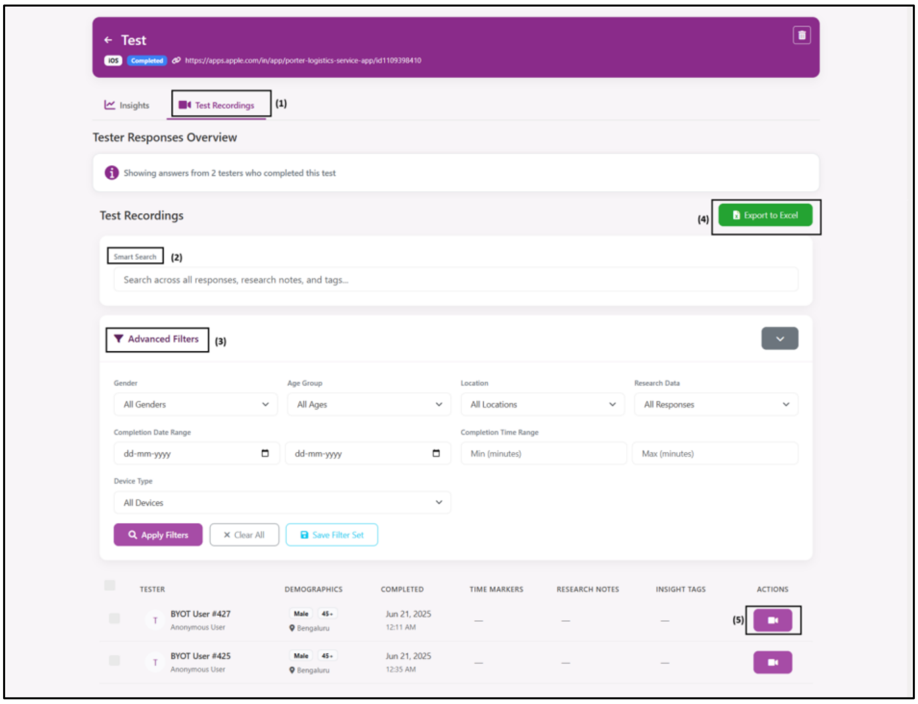
Step 3: Viewing and managing test recordings:

The **'Test Recordings' tab (1)** provides access to full-screen session recordings, allowing you to observe how users interacted with your test in real time. This section also includes valuable metadata (such as tester demographics and completion time) and annotations (like research notes and insight tags), enabling in-depth analysis and efficient report generation.

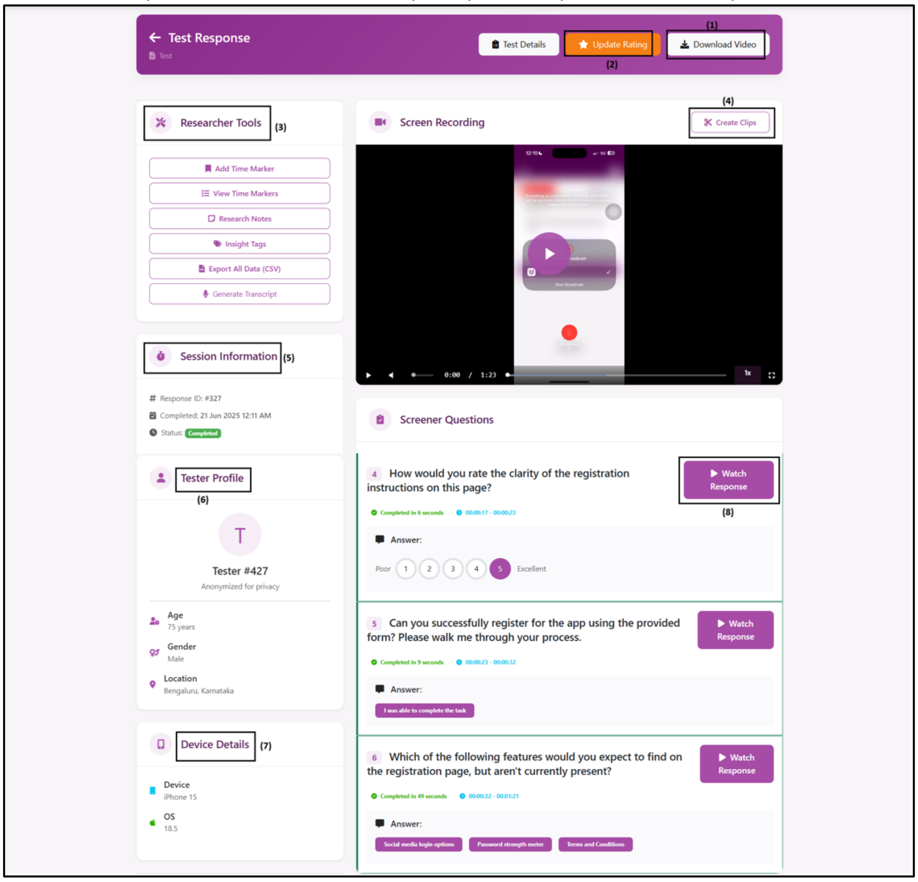
Use the **'Smart Search' bar (2)** to quickly locate specific feedback, notes, or tags by entering relevant keywords. Apply **'Advanced Filters' (3)** to refine your view based on demographics, device type, or custom tags - ideal for analyzing specific user segments within a larger test audience.

Click the **'Export to Excel' button (4)** to download all tester data, including responses, notes, and tags, in an Excel format for offline access or team sharing.

To view a tester's session, click the **'Video' icon (5)**. This will play the full recording, offering a direct window into the user's experience.

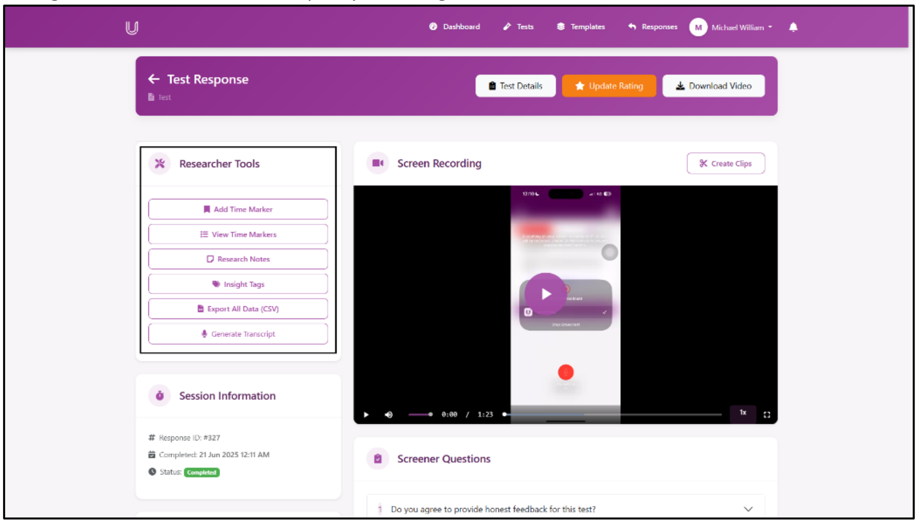


When you view response video, you can **'download' (1)** the video for offline review, **'update rating' (2)** to the tester based on the quality & relevance of their feedback, use **'[Researcher Tools](#)' (3)**, **'create short clips' (4)** from the full video where the user shares a useful insight or highlights a pain point, check the **'Session Information' (5)** for test completion details, see **'tester details' (6)** such as age, gender and location, '**device details' (7)** which the tester used, you can use the '**watch response' (8)** button for each question/task which will directly take you to the particular timestamp in the screen recording.

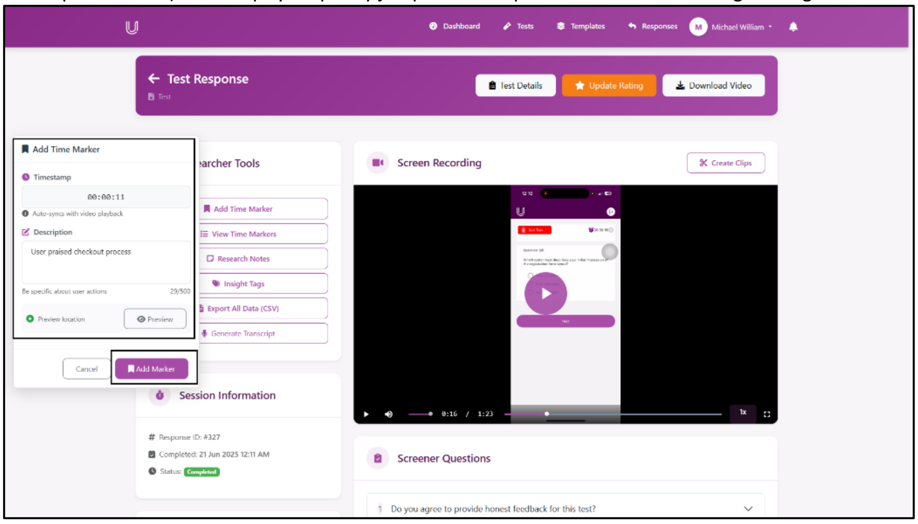


9. **Researcher tools:**
The researcher tools section offers essential features to help you review user sessions more efficiently. It allows for deeper

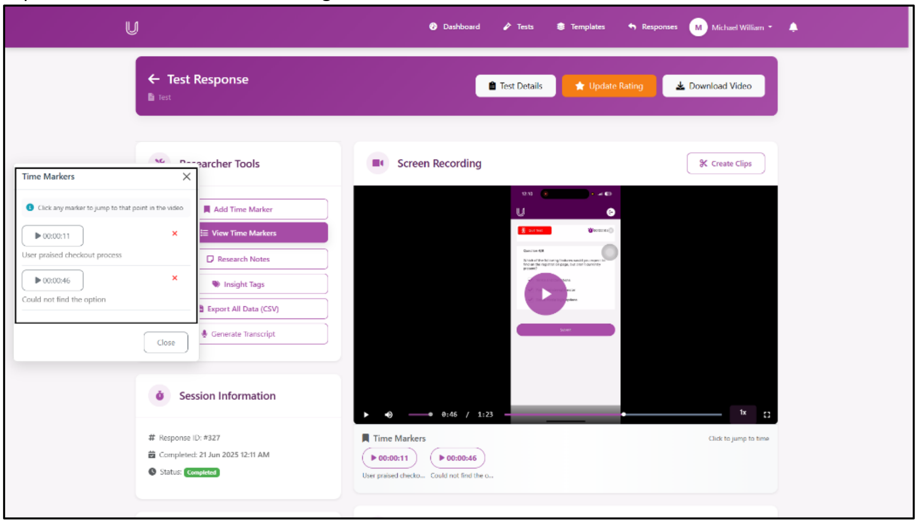
analysis, better organization of insights, and easy identification of key user behaviors. This section is designed to streamline your testing workflow and enhance the quality of findings.



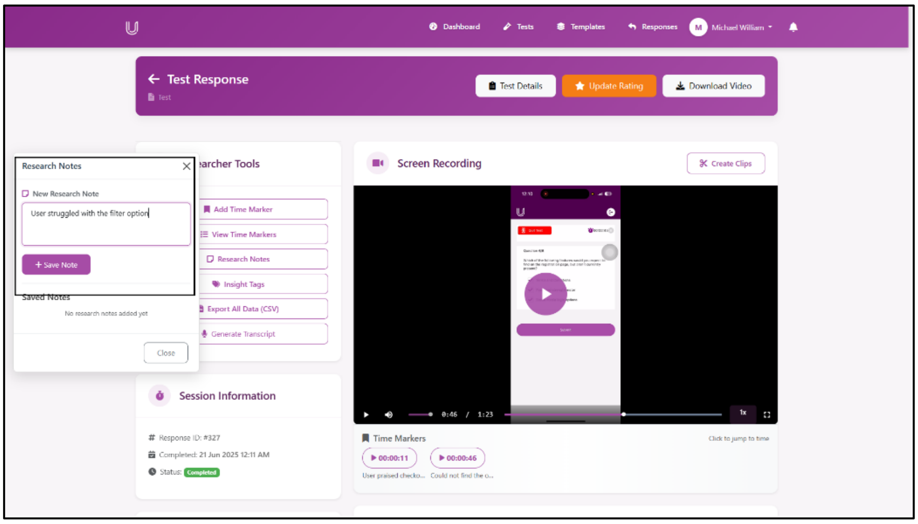
Add time marker: Use this to bookmark specific moments during a test session (e.g., when a user struggles, gives key feedback, or completes a task). This helps you quickly jump to critical points in session recordings during review.



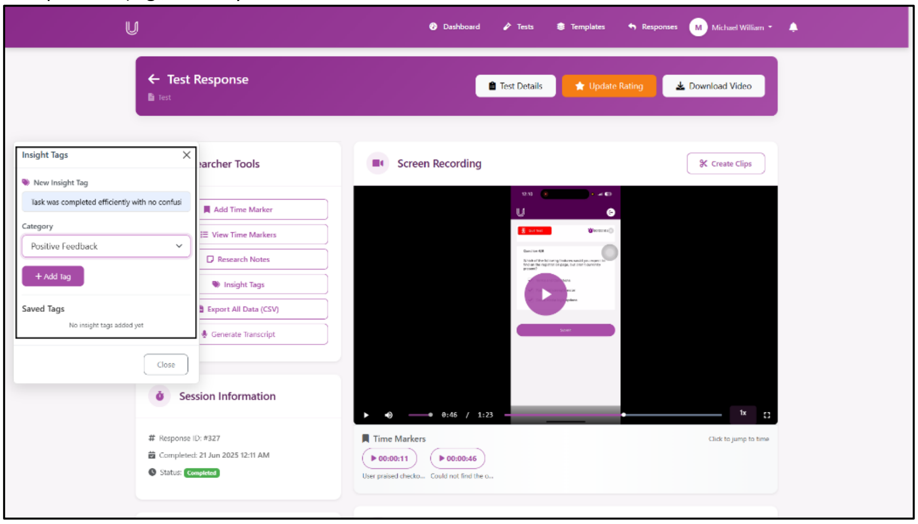
View time markers: This lets you see a list of all the time markers you've added in a session. This provides quick access to important moments without watching the entire video.



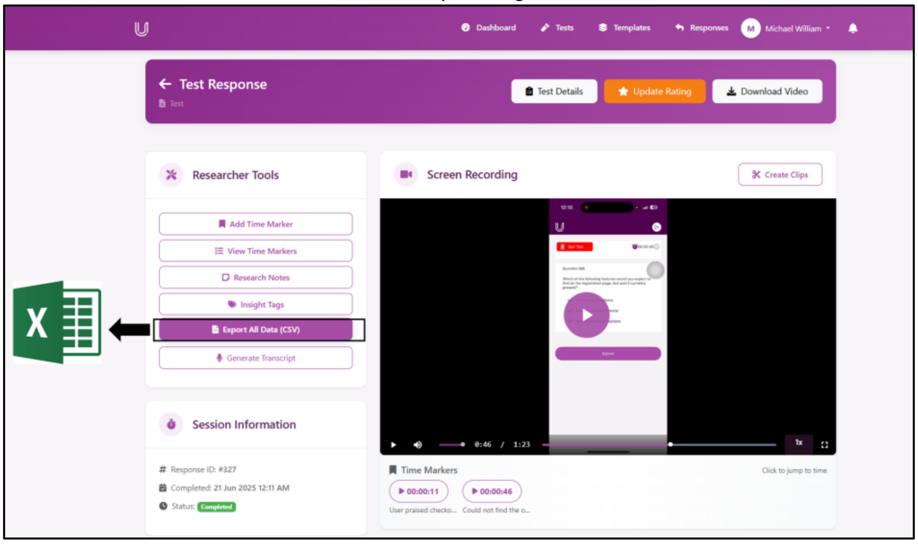
Research notes: Allows you to jot down observations, feedback, or questions while reviewing a session. This keeps your qualitative insights organized in one place.



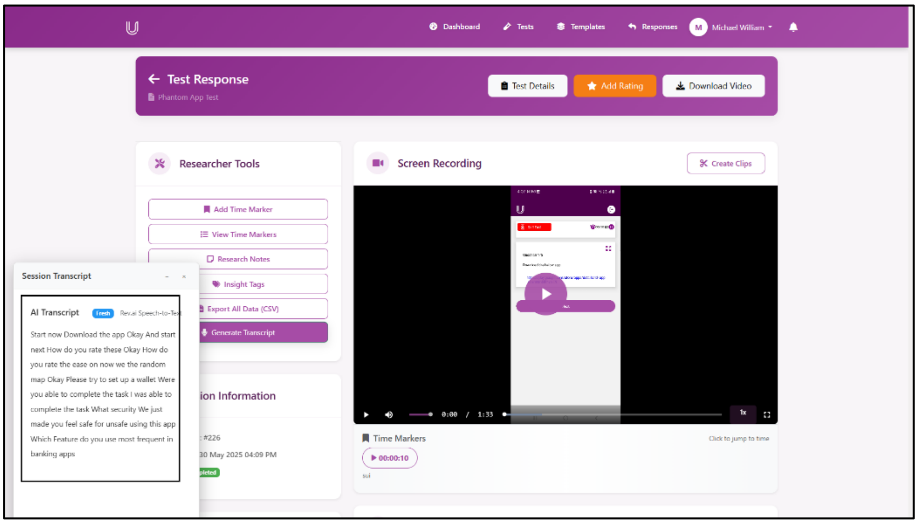
Insight tags: Use tags to categorize patterns or recurring themes you observe in user behavior. This helps identify trends across multiple tests (e.g., usability issues, content confusion.



Export all data (CSV): Click this to download all research data - including time markers, notes, tags, and other session metadata—in CSV format. This enables offline analysis, integration with external tools.



Generate transcript: Click this to automatically generate a full transcript of the test session, including everything the user said during the recording. This helps you quickly review key insights, quotes, and pain points without rewatching the entire video.



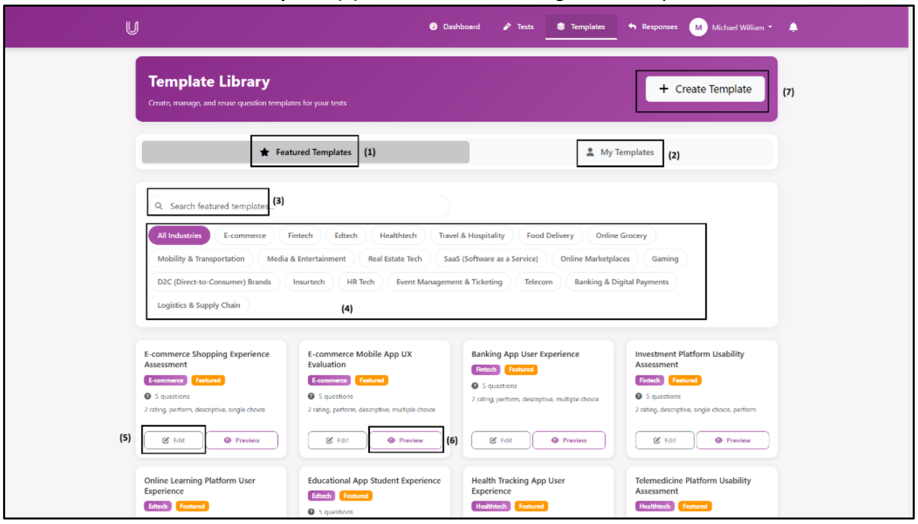
10. Template library:

This Template Library page allows you to create, manage, and reuse question templates for your usability tests. The page is divided into 2 tabs: **'Featured Templates' (1)** which includes pre-designed templates across various industries, and **'My Templates' (2)** where you can access templates you've created. You can use the **'search bar' (3)** to find templates by keywords or use the **'industry filters' (4)** to explore templates tailored to sectors like E-commerce, Fintech, edtech, Healthtech, and more.

Each template displays its title, associated industry, number of questions, and question types (e.g., rating, descriptive, multiple choice). For each template, you have the option to **'edit' (5)** its content or **'preview' (6)** it before using it in a test.

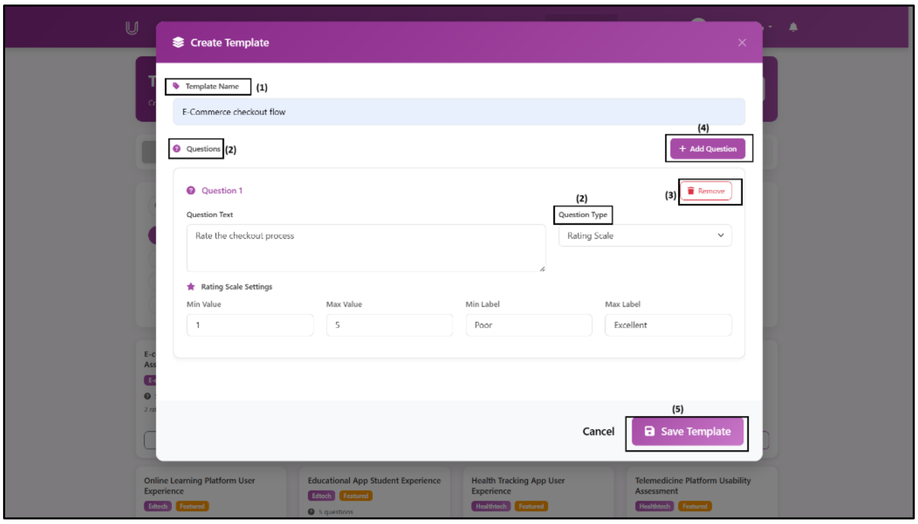
This section streamlines the test creation process by allowing quick selection and customization of ready-made templates suited for different testing goals.

You can click on the **'Create Template' (7)** button to start building a new template from scratch.

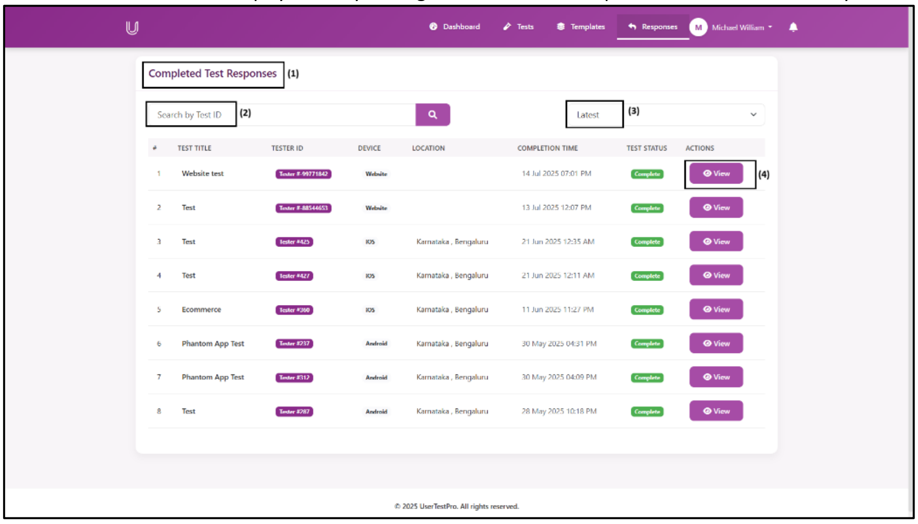


'Create Template' interface within the UserTest Pro platform, where researchers or test creators can build reusable test templates. At the top, the user is required to enter a **'Template Name' (1)** to define the context or goal of the template. Under the **'Questions' (2)** section, the user can add any number of tasks/questions to be presented to the testers.

The question can be removed by clicking the **'Remove' button (3)**, and additional questions can be added using the **'+ Add Question' button (4)**. Once all questions are set, clicking the **'Save Template' button (5)** stores the template in the template library for future use across various tests. This feature ensures consistency in test formats and saves time when conducting multiple rounds of user testing within similar categories or flows.



The **'Completed Test Responses' (1)** section displays a list of all submitted user test sessions. You can use the **'search bar' (2)** to filter by Test ID and the **'dropdown' (3)** to sort responses. Click the **'View' (4)** button to access individual session recordings and feedback. This dashboard helps you easily manage and review all completed tests for further analysis.



11. Conclusion:

With the completion of the unmoderated test creation process, it is crucial to conduct a thorough review of all configurations to ensure the test is aligned with your research objectives. This includes verifying essential elements such as the test title and description, tasks and question flow, response limits, participant source (UserTest Pro panel or Bring Your Own Testers), and any applied screeners or quality control measures. Each component should be carefully assessed for clarity, accuracy, and consistency with the goals defined during the planning stage.

Before launching the test, ensure that all instructions provided to participants are clear, concise, and easy to understand without real-time guidance. Since unmoderated tests are completed independently, tasks and questions must be logically structured, free from technical issues, and compatible across the devices your participants may use. If your test has specific requirements such as demographic filters, device type, or behavior expectations, these should be clearly communicated within the test description.

This final review phase is essential to minimize errors, prevent participant confusion, and ensure that the data collected is meaningful and reliable. A well-prepared, error-free unmoderated test not only improves the quality of user feedback but also creates a smoother, more intuitive experience for your participants. Once all elements are reviewed and validated, the test can be confidently launched - moving into the next stage of collecting responses, analyzing insights, and turning feedback into action.

12. Common FAQs:

a. Can I edit a test after publishing?
   Yes, you can edit certain details such as the schedule or response limit. However, core elements like questions may be locked once the test is live.

b. What if I need help crafting questions?
You can use our built-in question templates, AI or reach out to our support team for assistance in framing effective test questions.

c. How long does it take to get responses?
Most tests begin receiving responses within a few hours. Completion time depends on your target audience and response limit.

d. Can I screen participants before they take the test?
Yes, you can add screener questions to ensure only qualified participants proceed with the test.

e. Are testers real users?
Yes, all testers are verified individuals who are part of our testing panel.

f. What's the difference between moderated and unmoderated tests?
Moderated tests involve real-time interaction between the participant and a moderator via live video call.
Unmoderated tests are completed independently by the participant without live guidance.
Each method offers unique benefits depending on your research goals.

g. Do I need to install any software for moderated sessions?
No external software is required. All moderated sessions run directly through the UserTest Pro platform using a browser-based video interface.

13. Need help?

If you need assistance or have any questions, feel free to contact us at support@usertestpro.com Our support team will get back to you within 3 business days.