

## UserTest Pro: From Test Creation to Insights

### 1. Welcome to UserTest Pro!

This document will guide you through every step of the Bring Your Own Testers (BYOT) process from creating your first test to inviting your own users, managing responses, analyzing insights, and downloading reports so, you can confidently collect valuable feedback from your own audience.

### 2. Pre-requisites checklist:

- ✓ You have a client login to UserTest Pro
- ✓ You have a clear goal for your test
- ✓ You've identified and have access to your own testers (email list, community, etc.)
- ✓ Assets or prototype links (Figma, website, APK, etc.)
- ✓ 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. Bring your own testers (BYOT):

It is a powerful feature on UserTest Pro designed for teams and organizations that want to gather user insights from their own audience, rather than relying solely on UserTest Pro tester panel. Whether you're a product team, UX researcher, marketer, startup founder, or educator, BYOT empowers you to run usability tests, concept validations, or feedback studies directly with your existing user base such as customers, students, employees, beta testers, or community members. The process is simple and fully self-serve: after creating an unmoderated test, you'll receive a unique test code that you can share through email, social media, messaging platforms, or internal channels. Participants can access the test without any technical setup - they simply enter their name and email to get started. It's ideal for situations where context-specific feedback from real users who already know or interact with your product is more valuable than generic insights from a broad tester panel.

**Note:** Bring Your Own Testers (BYOT) is currently available only for unmoderated tests. This feature will be extended to moderated tests soon.

In this document, we've used Unmoderated BYOT as an example, with relevant screenshots for reference.

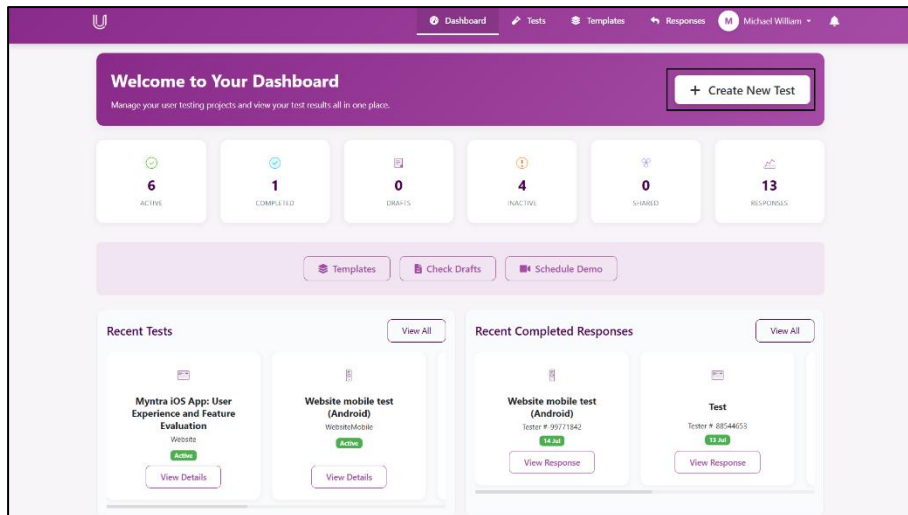
### 5. Quick navigation: UserTest Pro client guide:

1	Pre-requisites before you begin testing	<a href="#">Click</a>
2	Bring your own participants	<a href="#">Click</a>
3	Step-by-step guide to creating a new test	<a href="#">Click</a>
4	Manage teams and collaborate on user testing projects	<a href="#">Click</a>
5	Managing your tests and monitoring responses	<a href="#">Click</a>
6	Accessing and reviewing session screen recordings	<a href="#">Click</a>
7	Using researcher tools for deeper user insights	<a href="#">Click</a>
8	Test template library	<a href="#">Click</a>
9	Common FAQs	<a href="#">Click</a>
10	Support	<a href="#">Click</a>

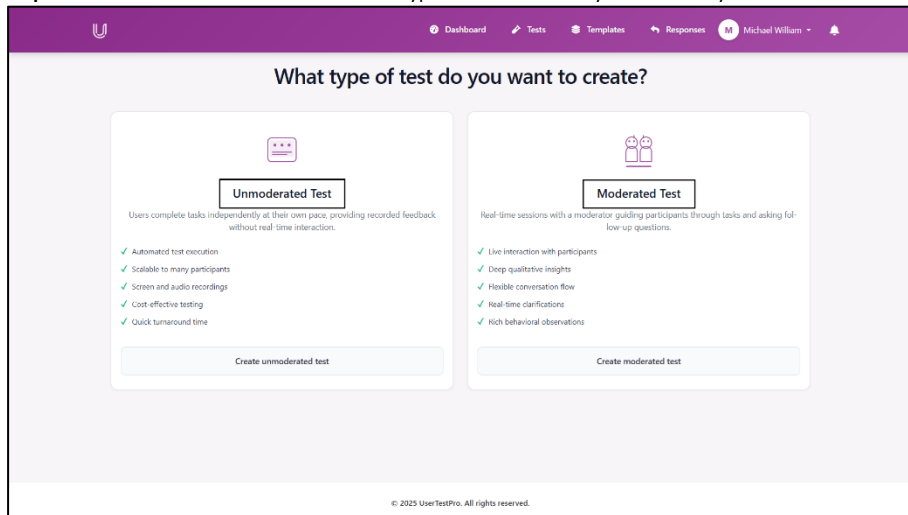
### 6. Step-by-step: Creating a new test

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





**Step 2:** Select **'Unmoderated Test'** as the test type - **BYOT** is currently available only for unmoderated tests.



**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.



**What do you want to test?**

(1)

**iOS**  
Test your iOS apps on iPhone & iPad devices.  
Create iOS test

**Android**  
Test your Android apps on phones & tablets.  
Create Android test

**Website**  
Test your website & prototypes on desktop & laptop browsers.  
Create website test

**Website Mobile**  
Test your website for mobile on iOS & Android.  
Create mobile test

**Great choice! What would you like to call your test?**  
This is the title testers will see when they take up the test.  
For confidentiality, consider using a generic title without revealing company or product names.

(2)

User experience interview

Continue →

(3)

✓ **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 – dos 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.

**Perfect! Now, what exactly do you want users to test?**  
This is the description testers will see when they take up the test.  
Focus on tasks and features to test without revealing proprietary or sensitive business details.

(1)

Test the checkout process and see if you can easily find the product

← Back

Continue → (2)

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

**URL:** The Web/App/Prototype 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.

Almost done! Where should testers go?

Enter the URL of the website or prototype to be tested.

(1)

← Back (2) All set! ✓

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✓ **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.

Test Creation  
Step 2 of 3

Dashboard Tests Templates Responses Michael Williams

Let's create your test tasks

Tasks are what your testers will complete during the test. How would you like to create them?

**Build from scratch**  
Design each task yourself with full flexibility and creative control.

**Auto-create with AI**  
Let AI create your tasks - refine them if needed.

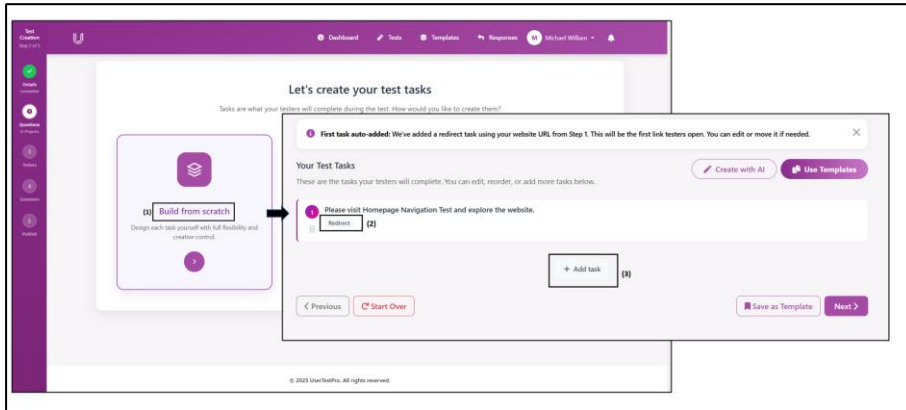
**Choose a template**  
Start with ready-made task templates and customize them to fit your needs.

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**Option 1:** 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.

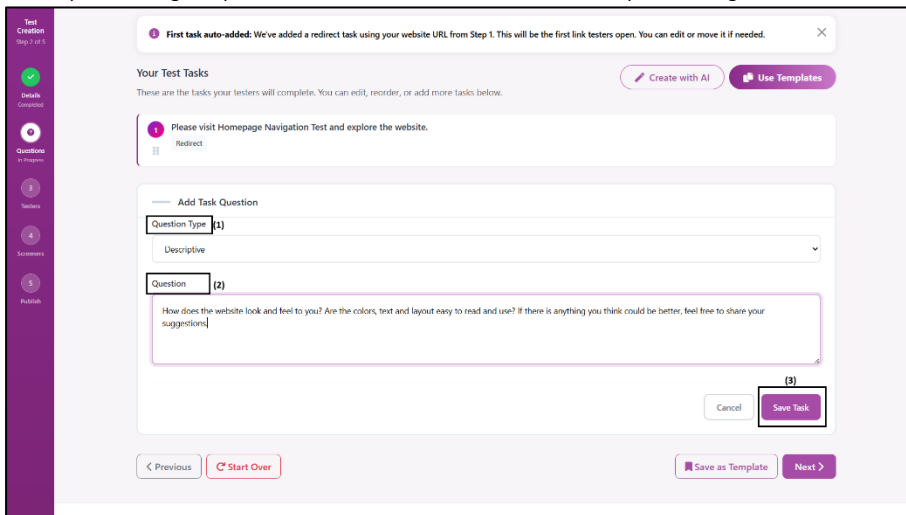


Select the **'Question Type'** from the dropdown menu **(1)**. The platform supports the following types: Multiple Choice, Single Choice, Descriptive, Rating, Task-Based, and Redirect. Add your **'Question or Task' (2)**. In this step, you'll enter the specific question or task that you want testers 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.

**Important:**

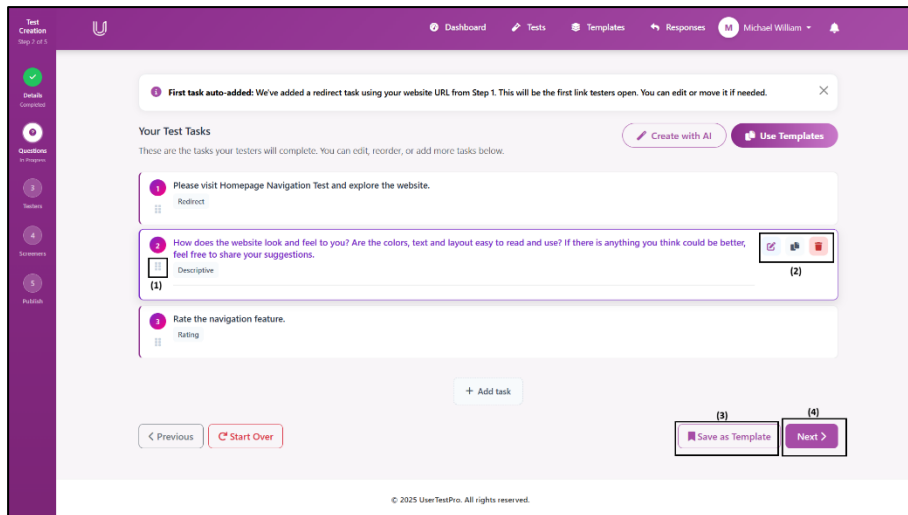
Your first question should always be of type 'Redirect'. In this step, paste your Web/App/Prototype link into the URL field. This is the link testers will visit and interact with during the test. Please note, our system automatically adds a default prompt such as 'Please visit xxyyzz.com' in the question 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.

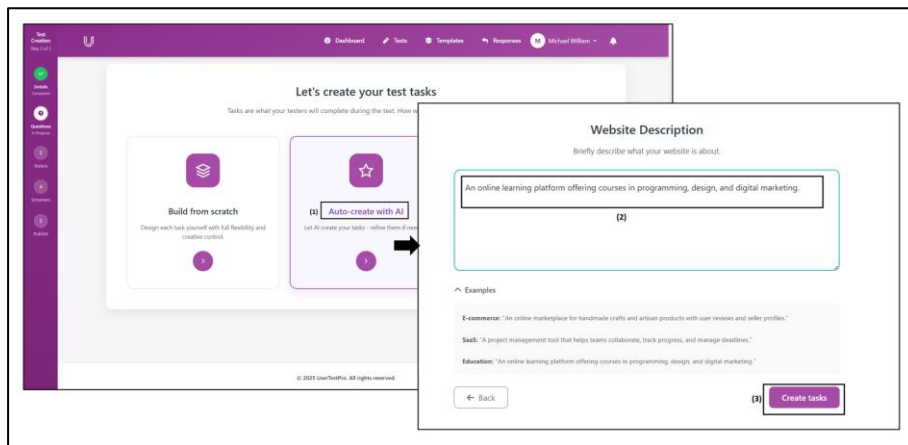


Once you have added all the questions/tasks, you can **rearrange** the tasks **(1)** or can **'edit, duplicate, or delete' (2)** the task if needed or **'save the template' (3)** for future use. When you're ready, click the **'Next' (4)** button to proceed to [Step 7](#)

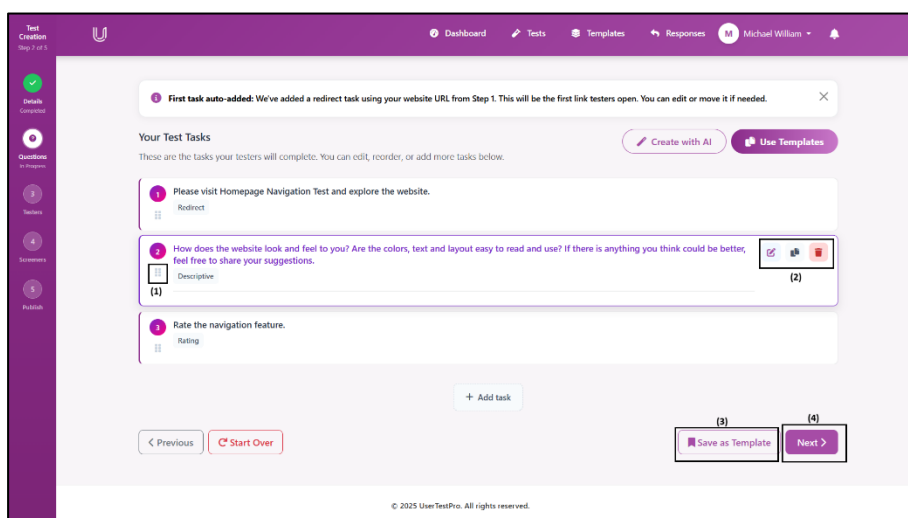




**Option 2:** Choose **'Auto-create with AI'** (1) to generate relevant questions and tasks with the help of AI. Briefly **'describe'** (2) what your app, website, or prototype is about, and then click the **'Create Tasks'** (3) button.

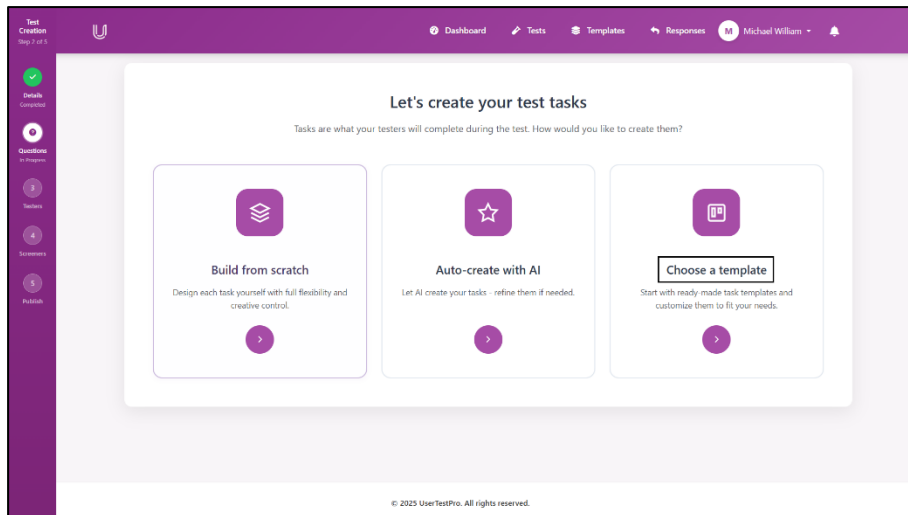


The AI will automatically generate a draft set of tasks, which you can **rearrange** the tasks (1) or can **'edit, duplicate, or delete'** (2) the task if needed or **'save the template'** (3) for future use. When you're ready, click the **'Next'** (4) button to proceed to [Step 2](#)



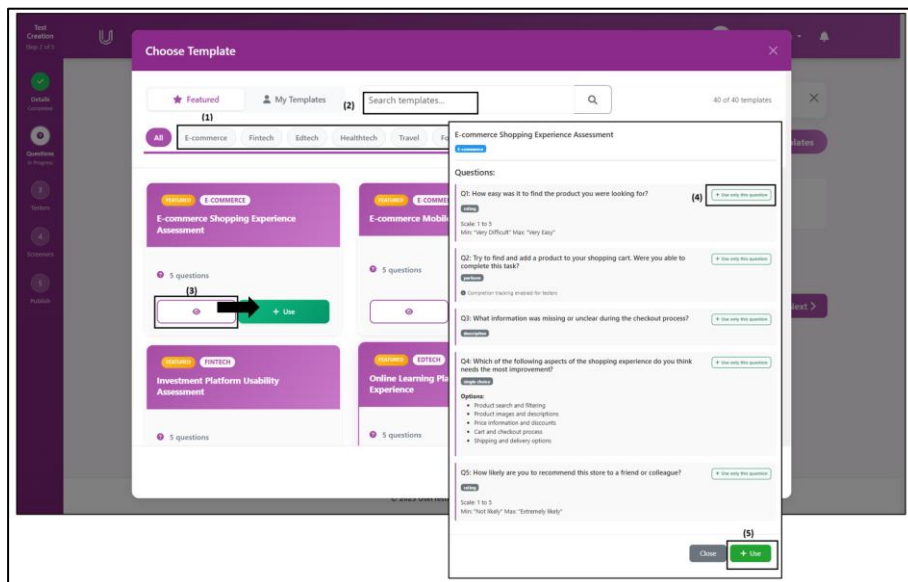
**Option 3:** Select **'Choose a template'** option to use a ready-made test template from our library, based on your industry or test objective.





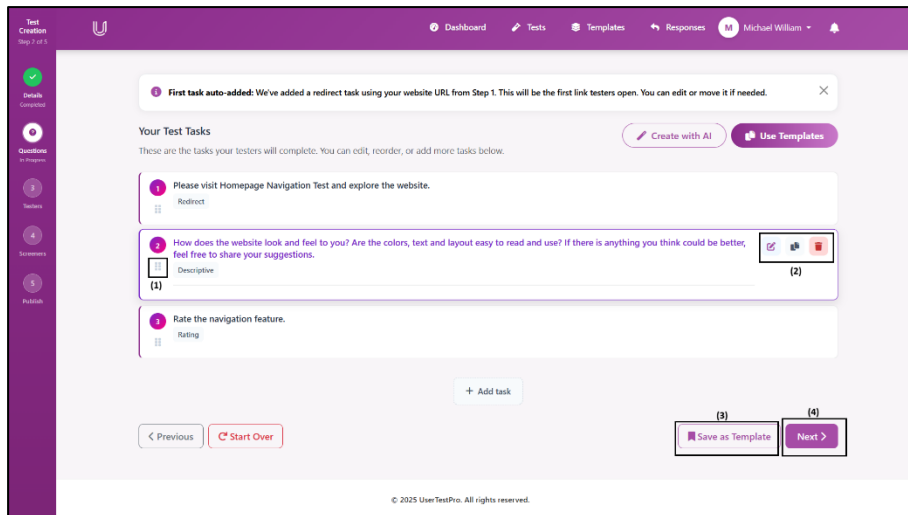
Choose a template based on your **industry type (1)**. You can also use the **search bar (2)** to quickly find a specific template.

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](#)



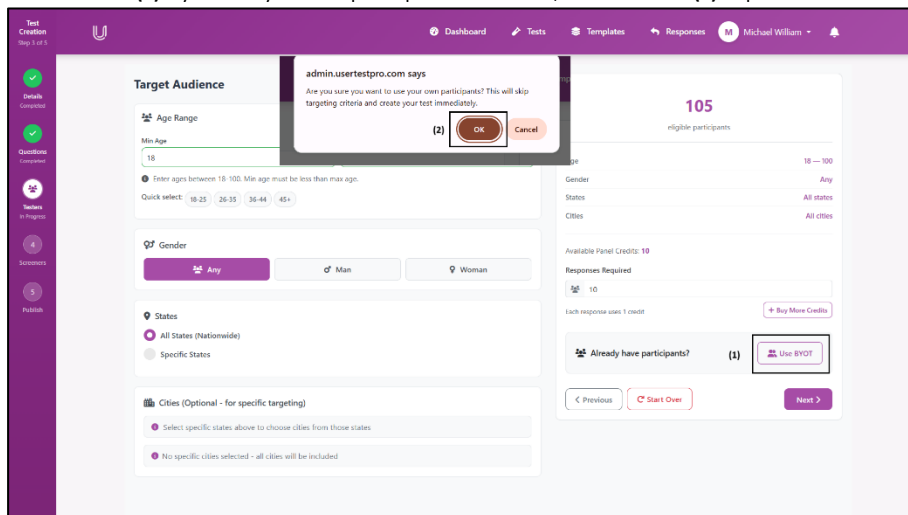


### Step 7: Set Target Audience.

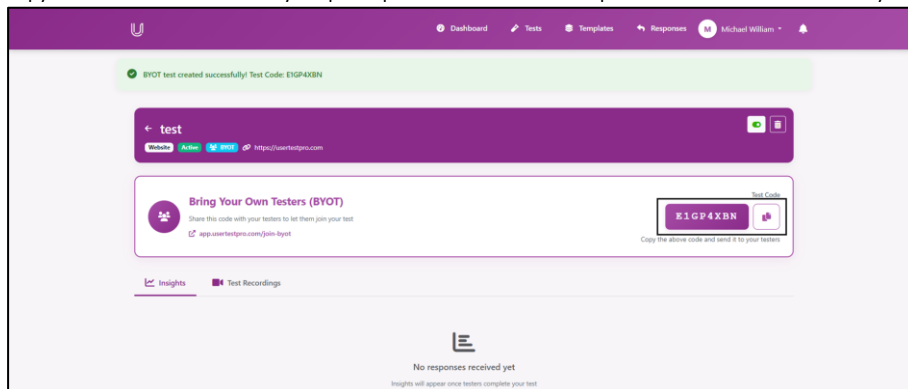
Choose "Bring Your Own Testers" if you have your own users who will take the test.

**Bring Your Own Testers or 'BYOT':** This feature allows you to use your own set of participants (such as customers, employees, or users from your own database) instead of relying on a UserTest Pro Testers panel.

Choose 'BYOT' (1) if you have your own participants for the test, then click 'OK' (2) to proceed.



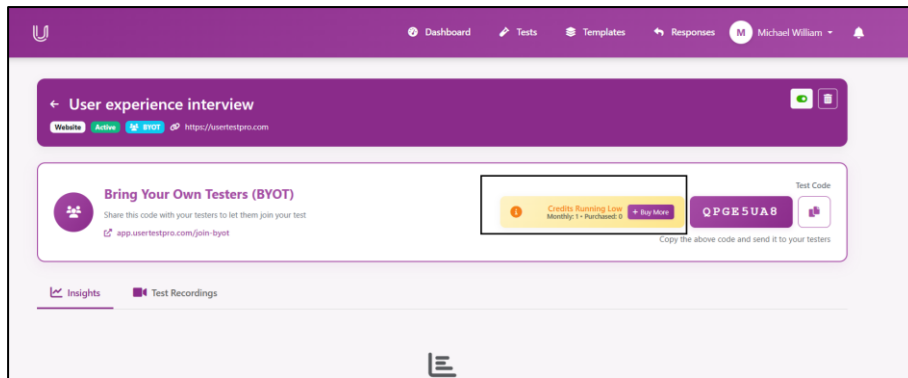
Copy the code and share it with your participants. The number of responses will be limited based on your available credits.



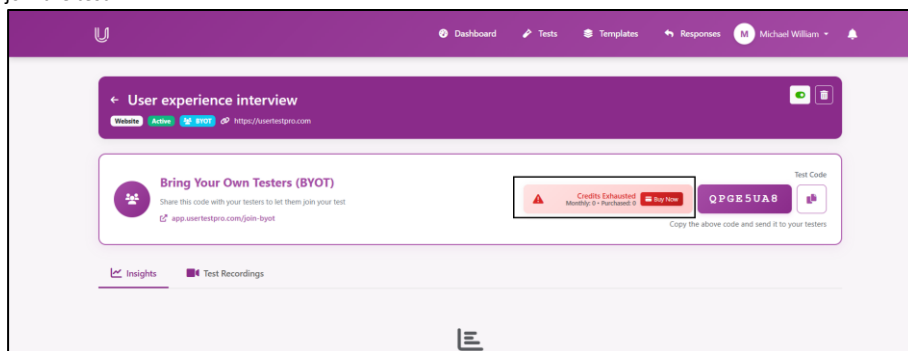
When your credits are running low, you'll receive a prompt stating '**Credits Running Low**'. At this stage, it's recommended to purchase additional credits to ensure you receive the required number of responses.







When your credits are exhausted, you'll receive a prompt stating '**Credits Exhausted**'. Participants will not be able to join the test using the unique test code until you purchase more credits. Once additional credits are added, participants can proceed to join the test.



For more information on pricing and credits, please visit our website: <https://www.usertestpro.com/pricing>

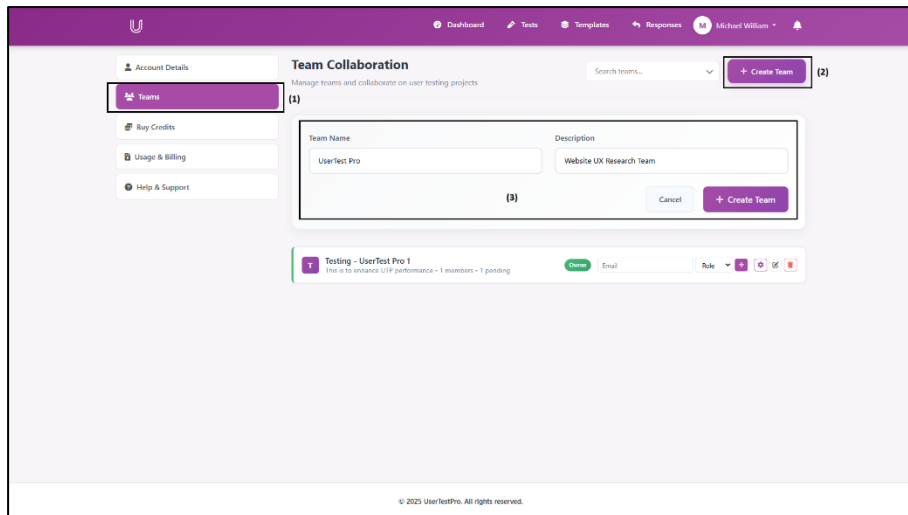
Once participants receive the code, they can join the test by entering the code along with their name and email address.

Once participants join using the code, they will begin the test you've set up. You can monitor responses in real time from your dashboard. Ensure that all test assets (e.g., Figma link, website, prototype, instructions) are accessible and functioning before participants begin. After the test is completed, you can review recordings, responses, and insights directly under the "Test Responses" tab.

## 7. Team collaboration:

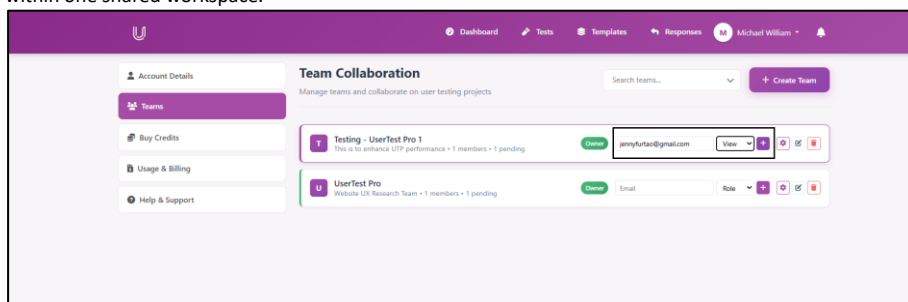
This section allows you to manage your internal teams and collaborate efficiently on user testing projects. To 'create a team' (2), click on 'Teams' (1) under the Profile section, then enter the 'team name' and a brief 'description' (3).





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:

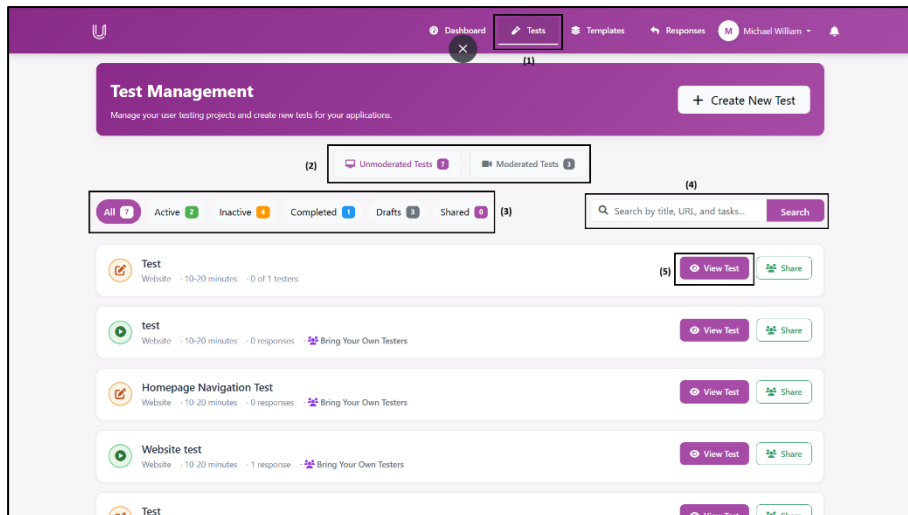
Once your test is live and responses begin to come in, UserTest Pro offers a centralized dashboard to efficiently manage test responses, analyze user insights, and download detailed reports - helping you turn feedback into actionable improvements.

### 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.

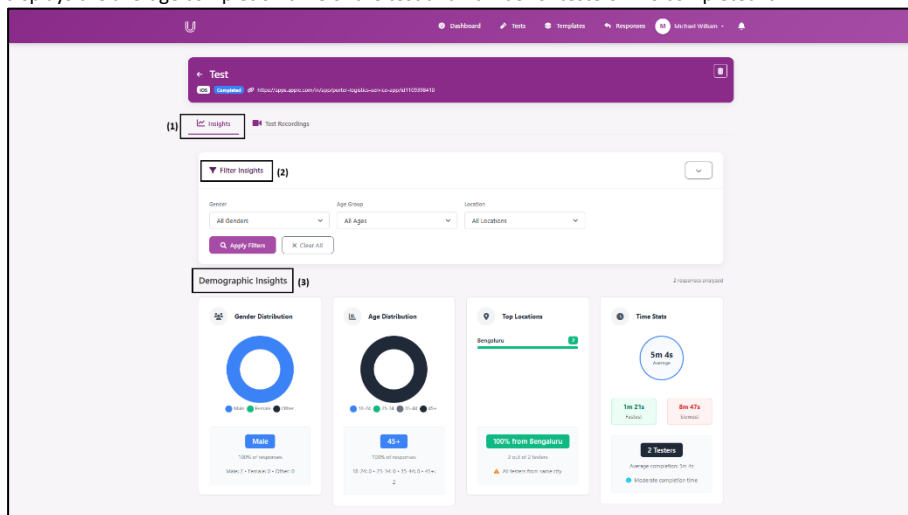
Once you find your desired test, click the **'View Test' (5)** button to access its details and responses.





## 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.

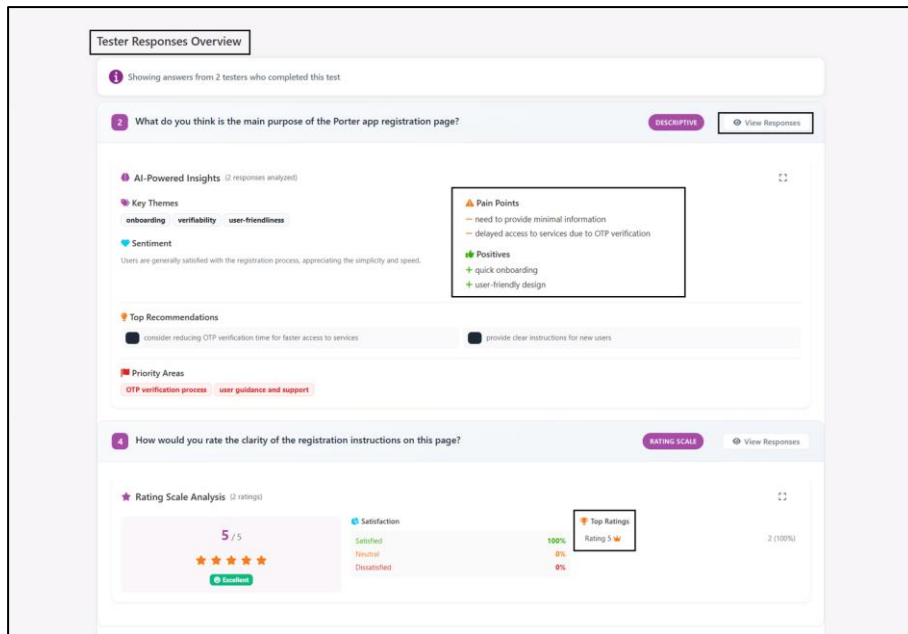


## Tester responses overview:

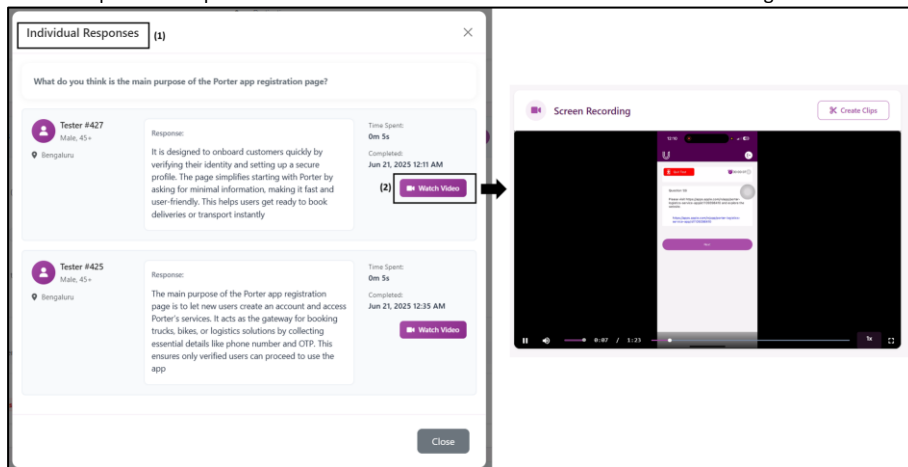
After analyzing demographic insights, scroll down to the Tester Responses Overview section to examine individual feedback in detail. This section displays the actual responses from users who completed the test, highlighting both qualitative and quantitative data.

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:

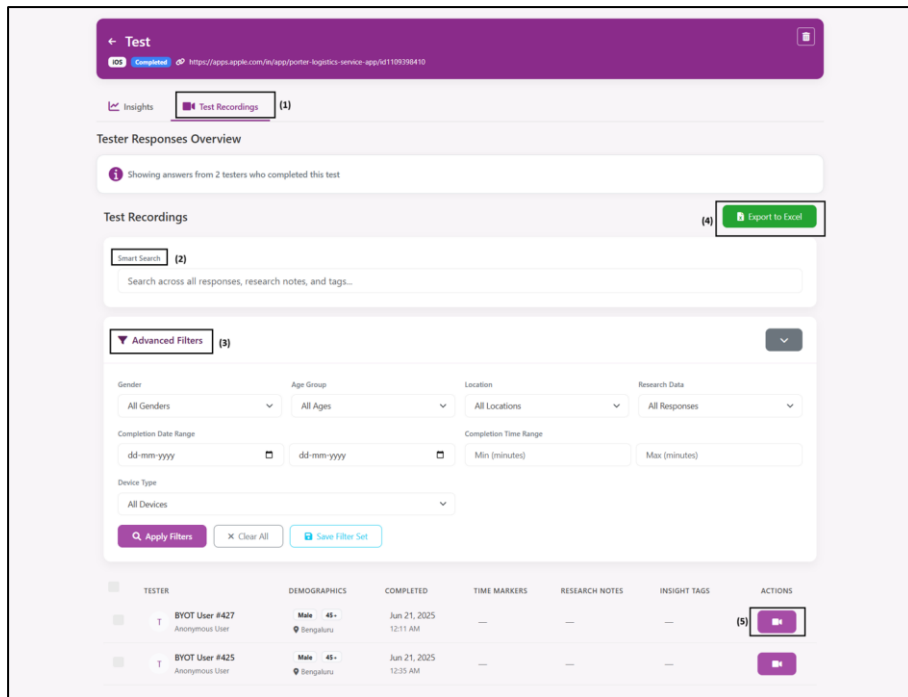
The **'Test Recordings' tab (1)** provides access to full-screen session recordings, allowing you to observe how users interacted with your test in real time. This section also includes valuable metadata (such as tester demographics and completion time) and annotations (like research notes and insight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

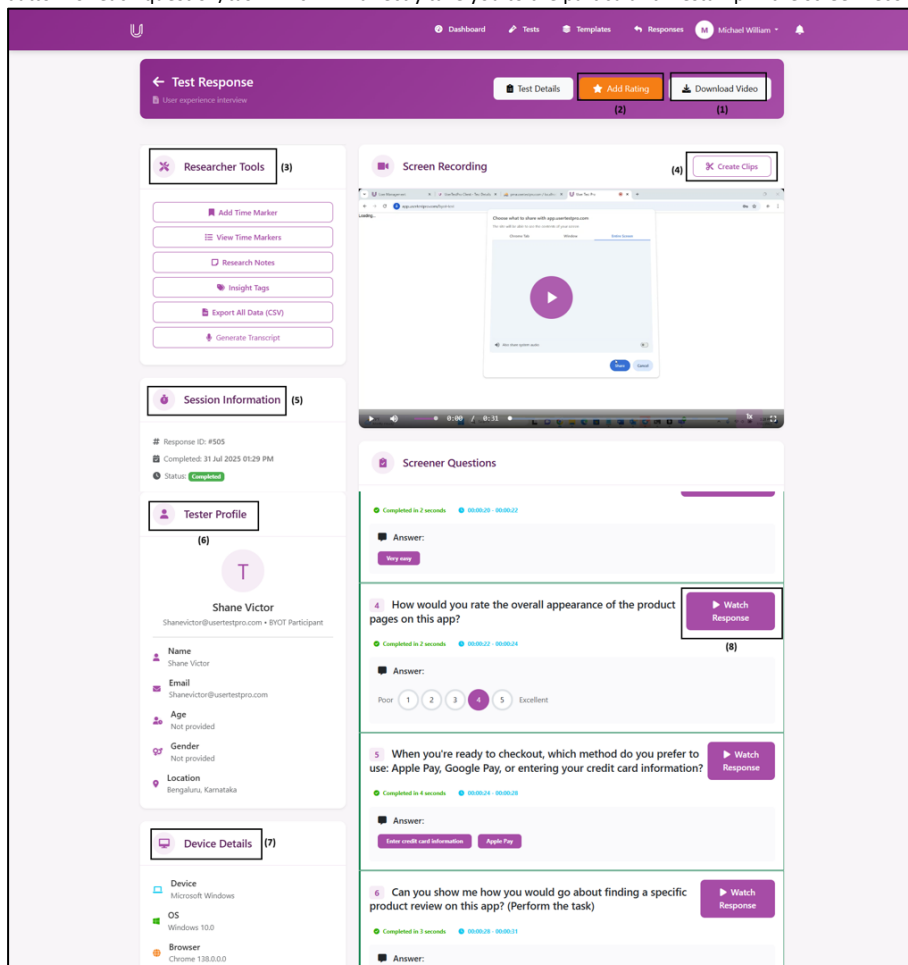
Click the **'Export to Excel' button (4)** to download all tester data, including responses, notes, and tags, in an Excel format for offline access or team sharing.

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.



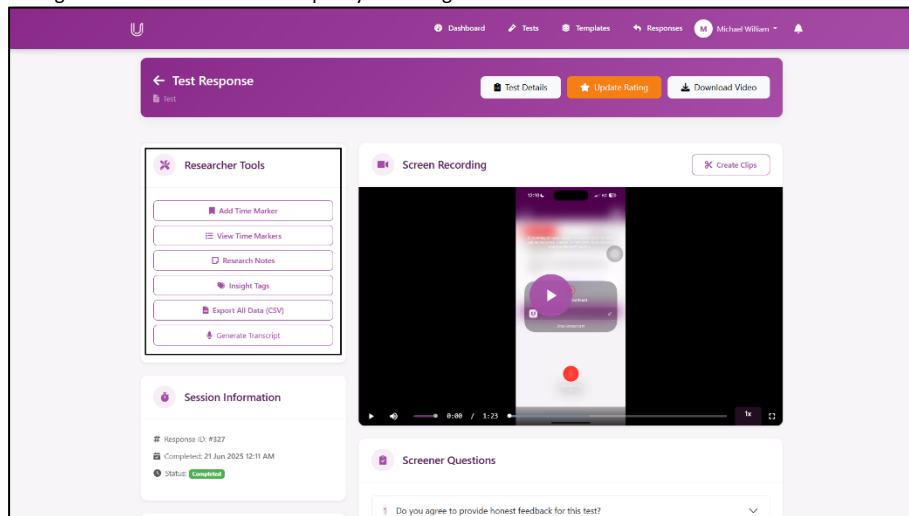


When you view response video, you can ‘download’ (1) the video for offline review, ‘update rating’ (2) to the tester based on the quality & relevance of their feedback, use ‘Researcher Tools’ (3), ‘create short clips’ (4) from the full video where the user shares a useful insight or highlights a pain 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.

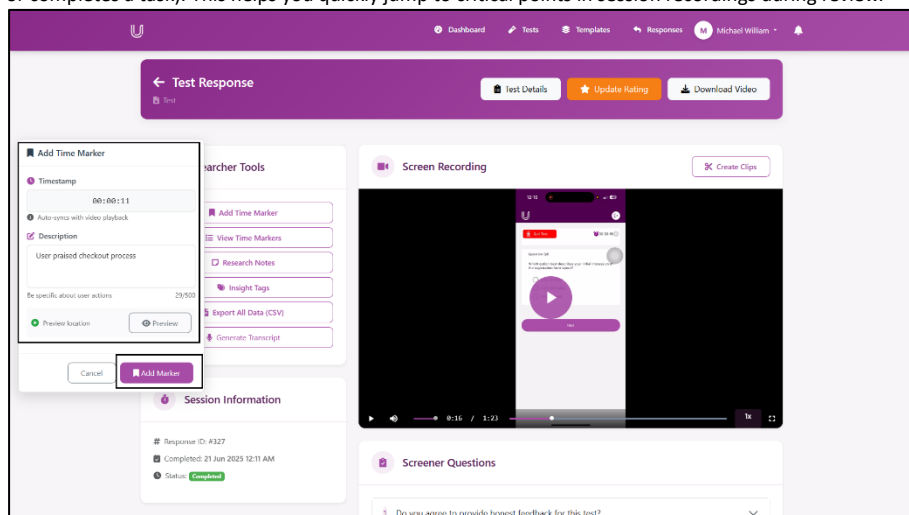


## 9. Researcher tools:

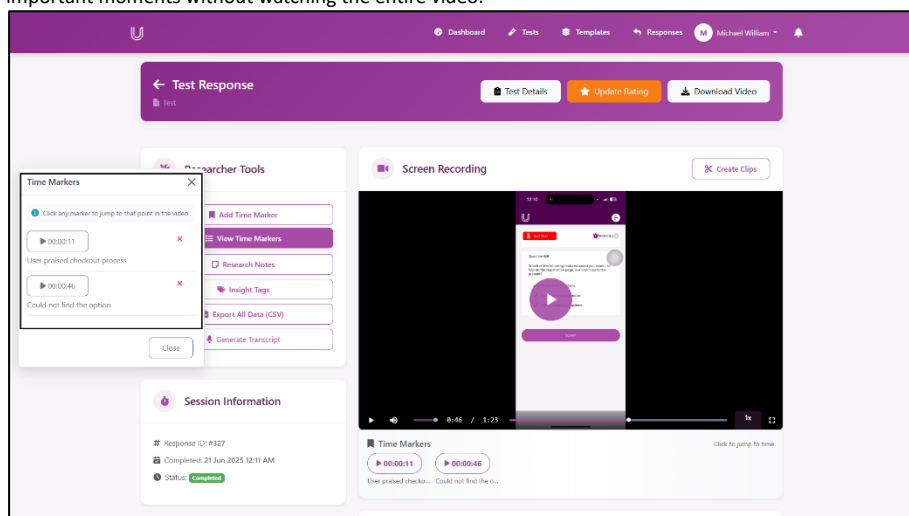
The Researcher Tools section offers essential features to help you review user sessions more efficiently. It allows for deeper analysis, better organization of insights, and easy identification of key user behaviors. This section is designed to streamline your testing workflow and enhance the quality of findings.



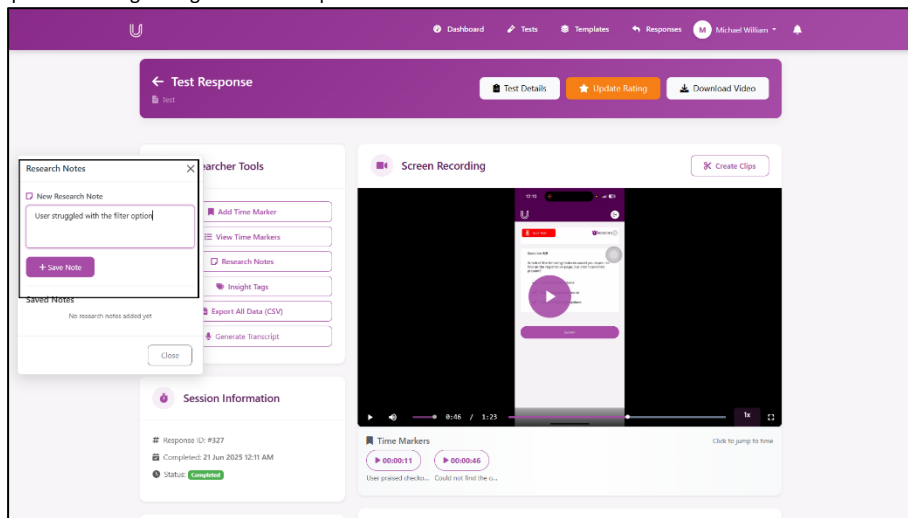
**Add time marker:** Use this to bookmark specific moments during a test session (e.g., when a user struggles, gives key feedback, or completes a task). This helps you quickly jump to critical points in session recordings during review.



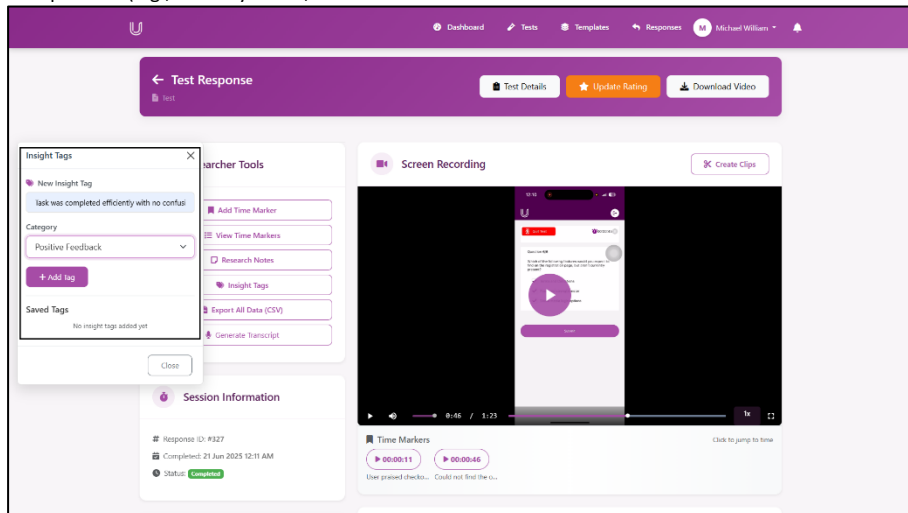
**View time markers:** This lets you see a list of all the time markers you've added in a session. This provides quick access to important moments without watching the entire video.



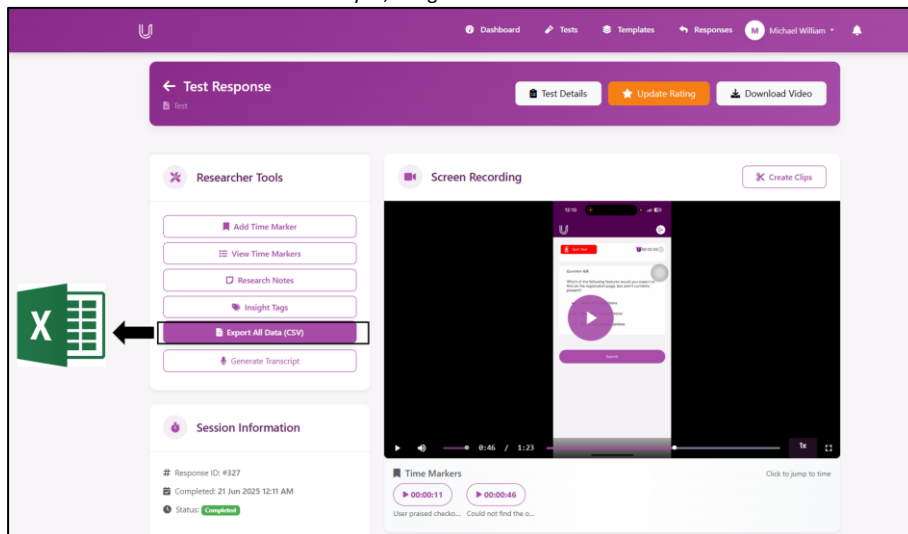
**Research notes:** Allows you to jot down observations, feedback, or questions while reviewing a session. This keeps your qualitative insights organized in one place.



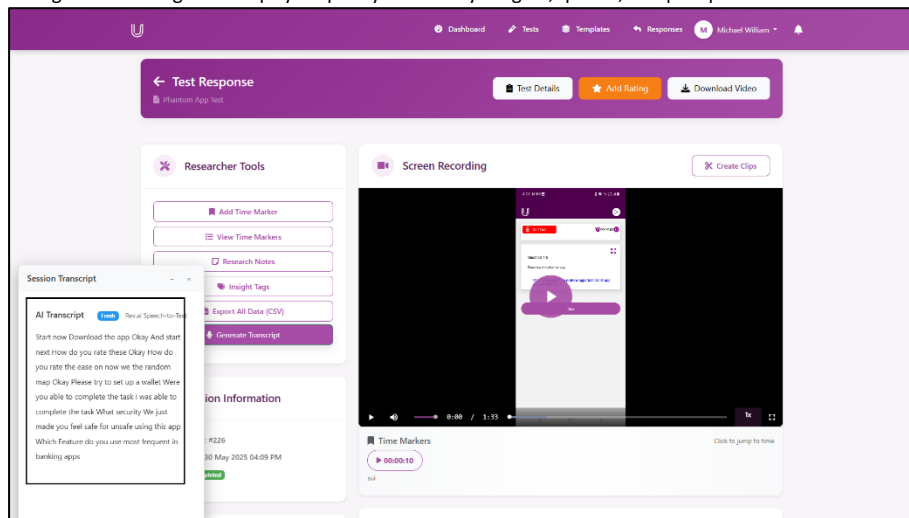
**Insight tags:** Use tags to categorize patterns or recurring themes you observe in user behavior. This helps identify trends across multiple tests (e.g., usability issues, content confusion).



**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.



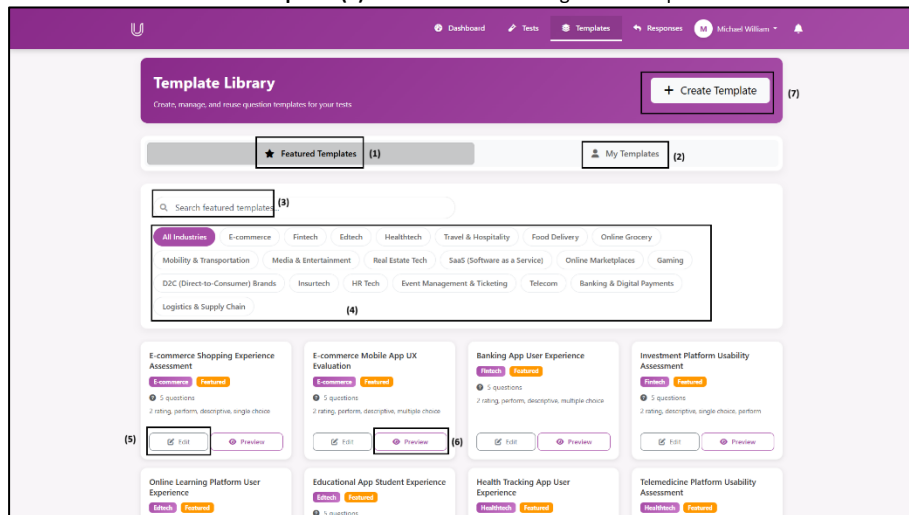
## 10. Template library:

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.

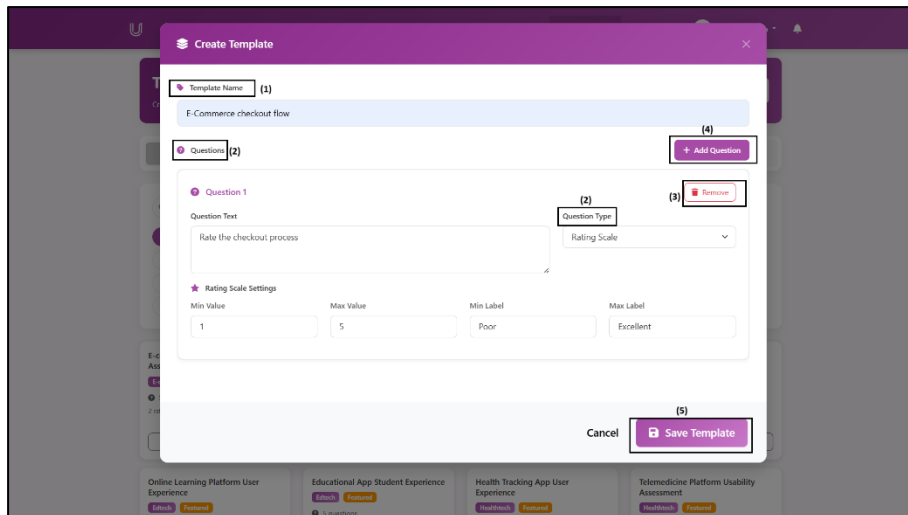


**'Create Template'** interface within the UserTest Pro platform, where researchers or test creators can build reusable test templates. At the top, the user is required to enter a **'Template Name' (1)** to define the context or goal of the template. Under the **'Questions' (2)** section, the user can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

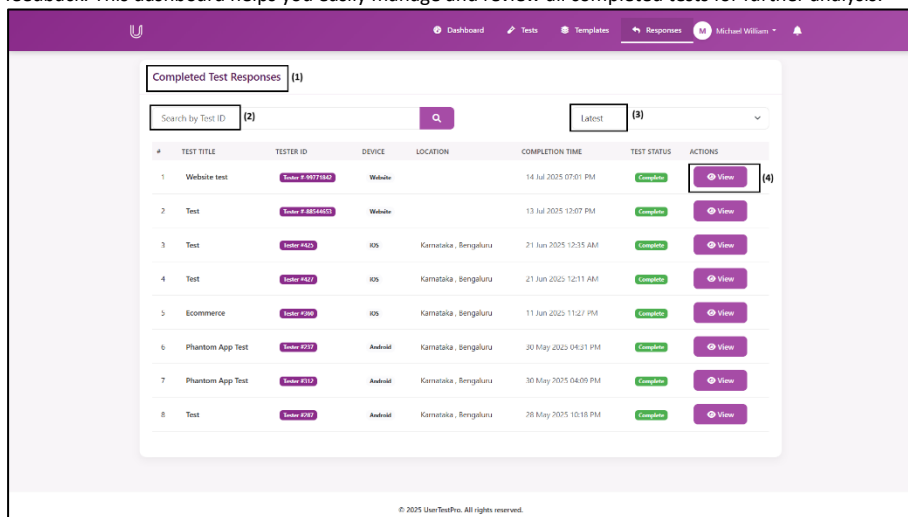
The question can be removed by clicking the **'Remove' button (3)**, and additional questions can be added using the **'Add Question' button (4)**. Once all questions are set, clicking the **'Save Template' button (5)** stores the template in the template library for future use across various tests. 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 your test setup using the Bring Your Own Testers (BYOT) option, it's essential to conduct a thorough review to ensure everything is aligned with your research objectives. Carefully verify key elements such as test title and description, task structure, response limits, and tester instructions as these directly impact the experience of your invited participants.

Since BYOT relies on your own user base, confirm that the test link is ready to be shared with the intended participants and that your communication clearly explains any important requirements such as device type, browser compatibility, or demographic expectations. Ensure all tasks and questions are logically ordered, technically sound, and easy to follow across different platforms (web, mobile, etc.).

Because BYOT is currently available only for unmoderated tests, there's no need to schedule moderator sessions but it's still important to double-check that testers will be able to complete the test without external support. Any prerequisites or context should be clearly outlined in the test instructions.

This final checkpoint is crucial to reduce errors, avoid tester confusion, and ensure the integrity of the data you collect. A well-prepared and clearly communicated test improves response quality and offers a smoother experience for both you and your testers. Once everything is reviewed and confirmed, you're ready to launch and begin gathering valuable insights.

## 12. Common FAQs:

- 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.



- b. How long does it take to get responses?  
With BYOT, response time depends on how quickly you share the test link and how responsive your testers are. Most users begin receiving responses within a few hours.
- c. Can I track who has responded to the test?  
Yes, you can view participant names and emails in the response dashboard to track who has completed the test.
- d. What information does my testers need to provide?  
At minimum, testers must enter their name and email before starting the test.

### **13. Need help?**

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

