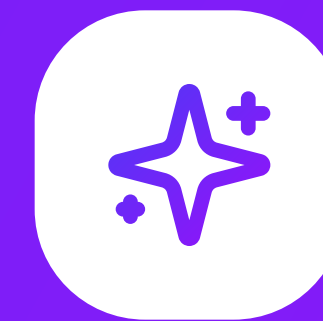


Public

User Acceptance Testing

for Flowmatic app



Flowmatic

Table Of Contents

1. Executive Summary

1.1. UAT Summary

2. Testing Methodology

2.1. Success criteria

2.2. Key scenarios

3. Detailed Findings

3.1. Issues Prioritized by Severity

3.2. Issues Detalization

1. Executive Summary

1.1. UAT Summary

Scenario ID	Scenario name	Pass / Fail Result	Number of Passed Criteria	Issues
1	Complete Profile Setup	Passed	6 out of 6 Passed	-
2	Configure Automation Workflow	Passed With Conditions	4 out of 6 Passed	ISS-04, ISS-05, ISS-06, ISS-08
3	Invite a teammate and collaborate	Passed	5 out of 6 Passed	ISS-07
4	Generate and share Report	Failed	2 out of 6 Passed	ISS-01, ISS-02, ISS-03

Issues Identified By Severity

2

Critical Issues

Block core functionality and prevent users from completing primary tasks.

Critical

3

High Issues

Disrupt key user flows and force users to find workarounds or restart their work.

High

3

Medium Issues

Introduce small usability gaps that require users to guess or seek clarification.

Medium

2. Testing Methodology

2.1. Success Criteria

01. Scenario Completion

The user can complete each task on their own, without help from the moderator.

02. Error-Free Critical Path

The main user flows work without dead ends or errors that block progress.

03. Error Recovery

When something goes wrong, the user can understand what happened and continue on their own.

04. Clarity Of Communication

Labels, buttons, and messages say what they mean. No guessing required.

05. Subjective Confidence

After each task, the user feels they did the right thing, not just that they got through it.

06. Overall Satisfaction

After the session, the user rates how easy and pleasant the product felt to use overall.

2.2. Key Scenarios

Scenario 1: Complete Profile Setup

S-01

Description

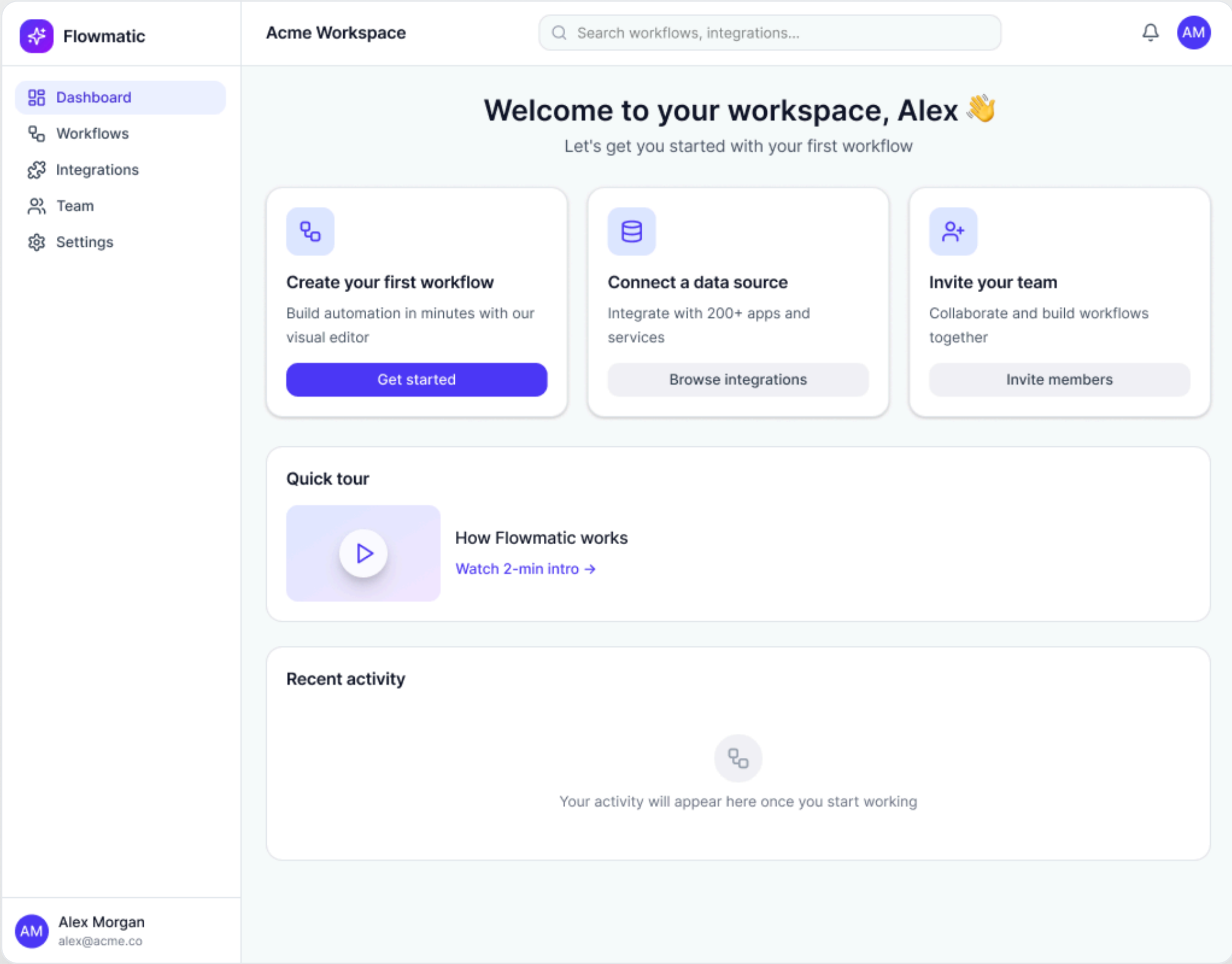
A first-time user opens the product, creates an account, completes the guided onboarding (profile setup, workspace creation, role selection), and lands on the main dashboard ready to start working.

Test Steps

- 1 Choose a sign-up method
- 2 Verify the email address via the confirmation link
- 3 Complete the profile setup form
- 4 Create the first workspace
- 5 Go through the welcome tour

Expected Result

The user reaches the main dashboard within 5 minutes, understands what the workspace is for, and can identify at least one next action without assistance.



2.2. Key Scenarios

Scenario 2: Configure Automation Workflow

S-02

Description

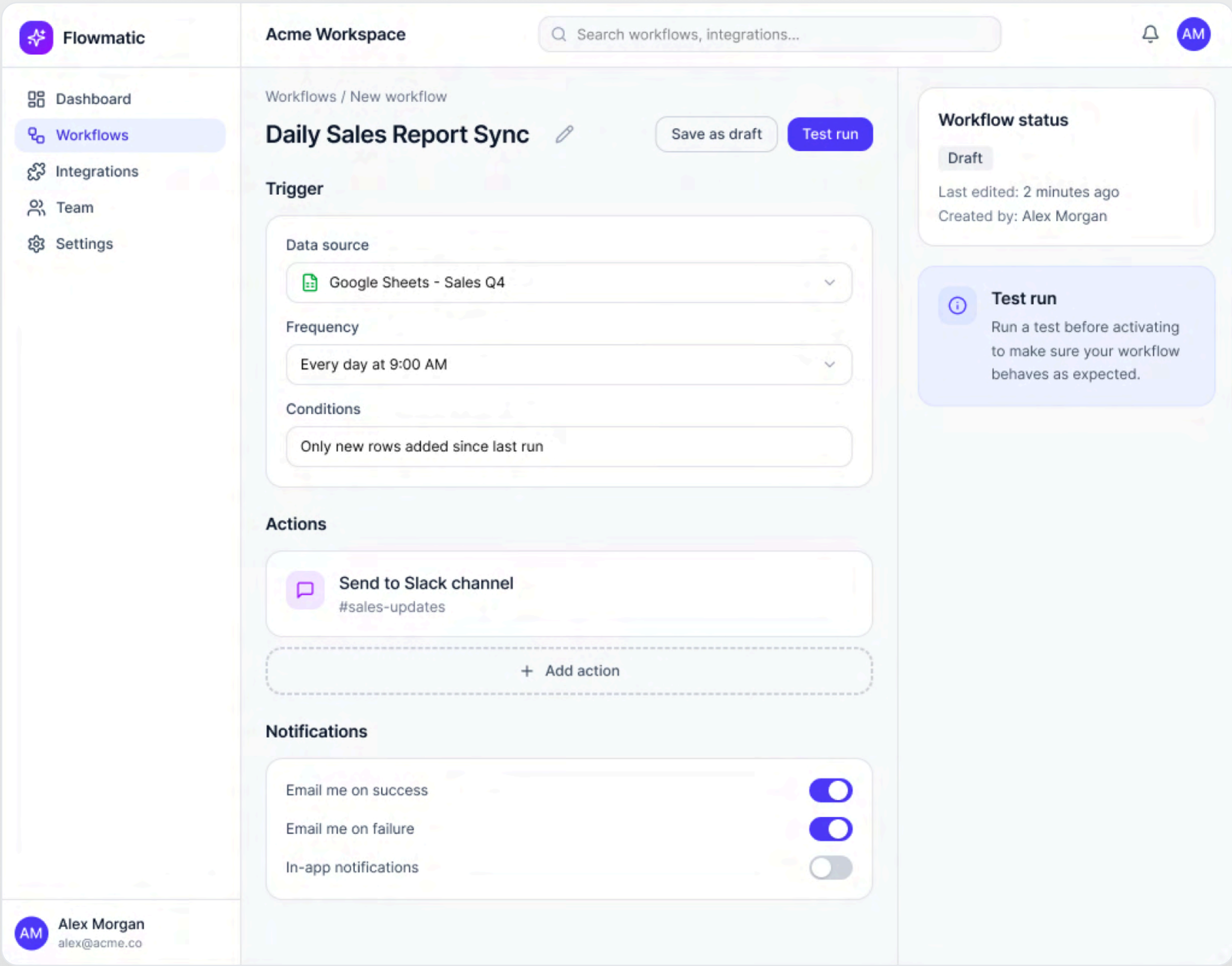
The user creates a new workflow from a template, customizes its parameters to match a realistic business need, saves the configuration, and confirms the workflow is ready to run.

Test Steps

- 1 Click "Create new workflow" on the "Workflows" section
- 2 Rename the workflow
- 3 Configure the input parameters (data source, frequency, conditions)
- 4 Configure notification preferences
- 5 Save the workflow as a draft
- 6 Validate via Test run and activate the workflow

Expected Result

The workflow is saved and activated successfully. The user understands the meaning of each setting and is confident the workflow will behave as expected.



2.2. Key Scenarios

Scenario 3: Invite A Teammate And Collaborate

S-03

Description

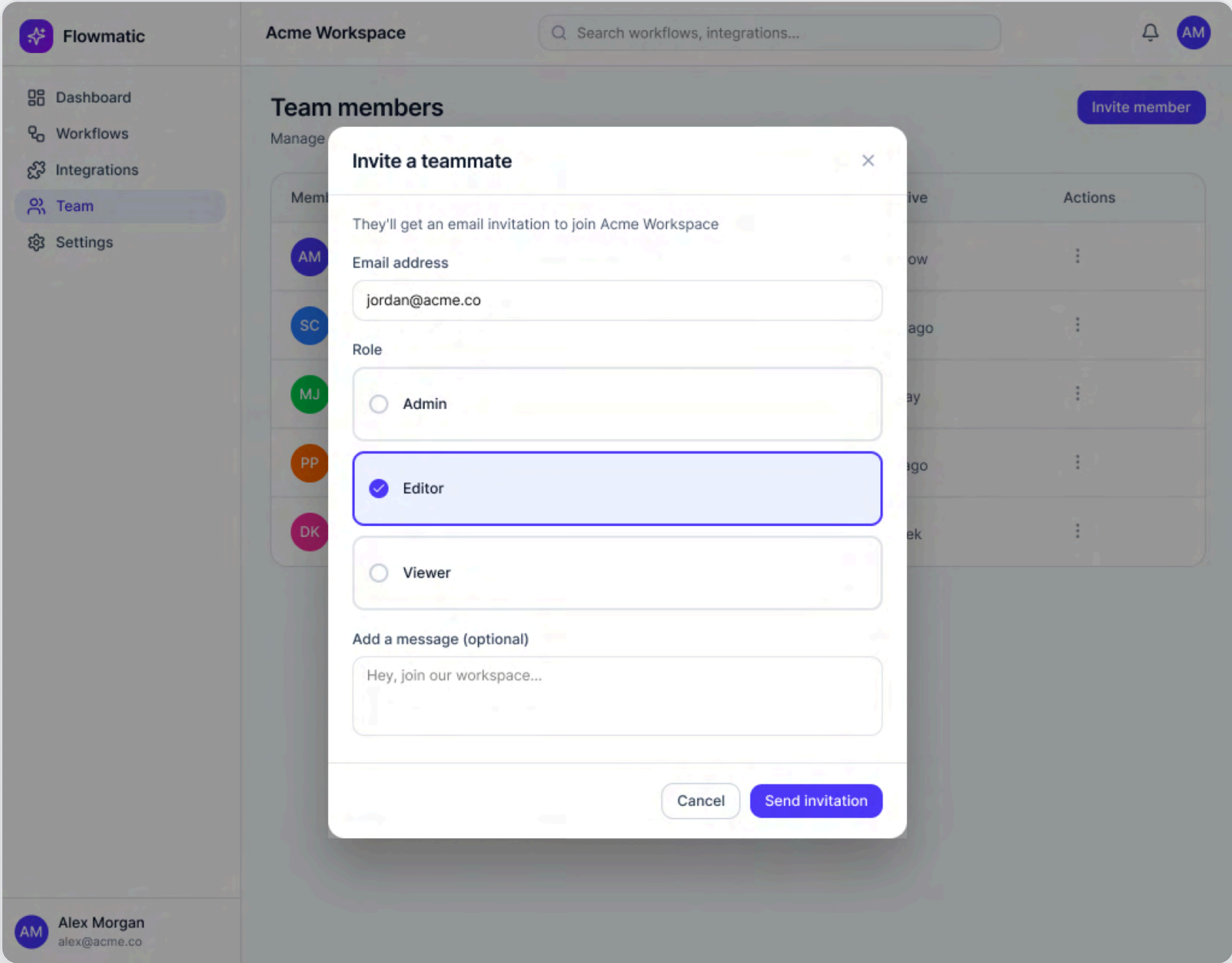
The user invites a colleague to the workspace, assigns them a role, shares an existing workflow with edit permissions, and confirms that both users can work on the same item simultaneously.

Test Steps

- 1 Navigate to the Team section
- 2 Send an invitation by email
- 3 Assign a role to the invited user
- 4 Open an existing workflow
- 5 Share the workflow with the invited user
- 6 Verify both users can edit simultaneously

Expected Result

The teammate receives the invite, joins the workspace with the correct role, and both users can collaborate on the workflow without conflicts. Permission boundaries (e.g. Viewer can't edit) work as expected.



2.2. Key Scenarios

Scenario 4: Generate And Share Report

S-04

Description

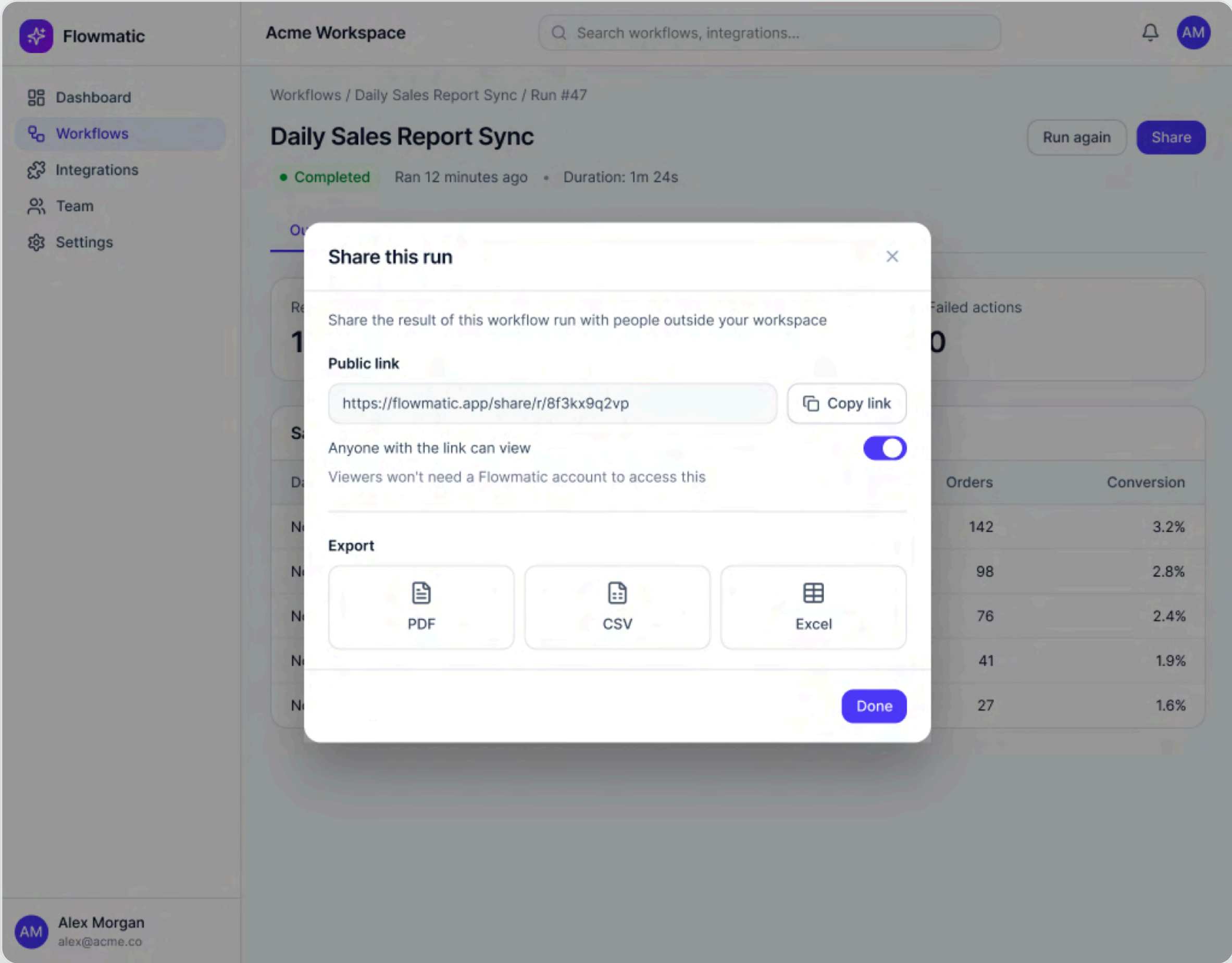
The user runs a previously configured workflow, waits for it to complete, reviews the output (report / data / file), and shares it with an external stakeholder via a public link or export.

Test Steps

- 1 Open the workflow created in Scenario 2
- 2 Run the workflow
- 3 Click "Share"
- 4 Copy the public link
- 5 Export the output as PDF
- 6 Verify the link in incognito mode

Expected Result

The workflow runs to completion, the output is generated correctly and can be exported in all available formats. The shareable link works for external viewers without requiring login.



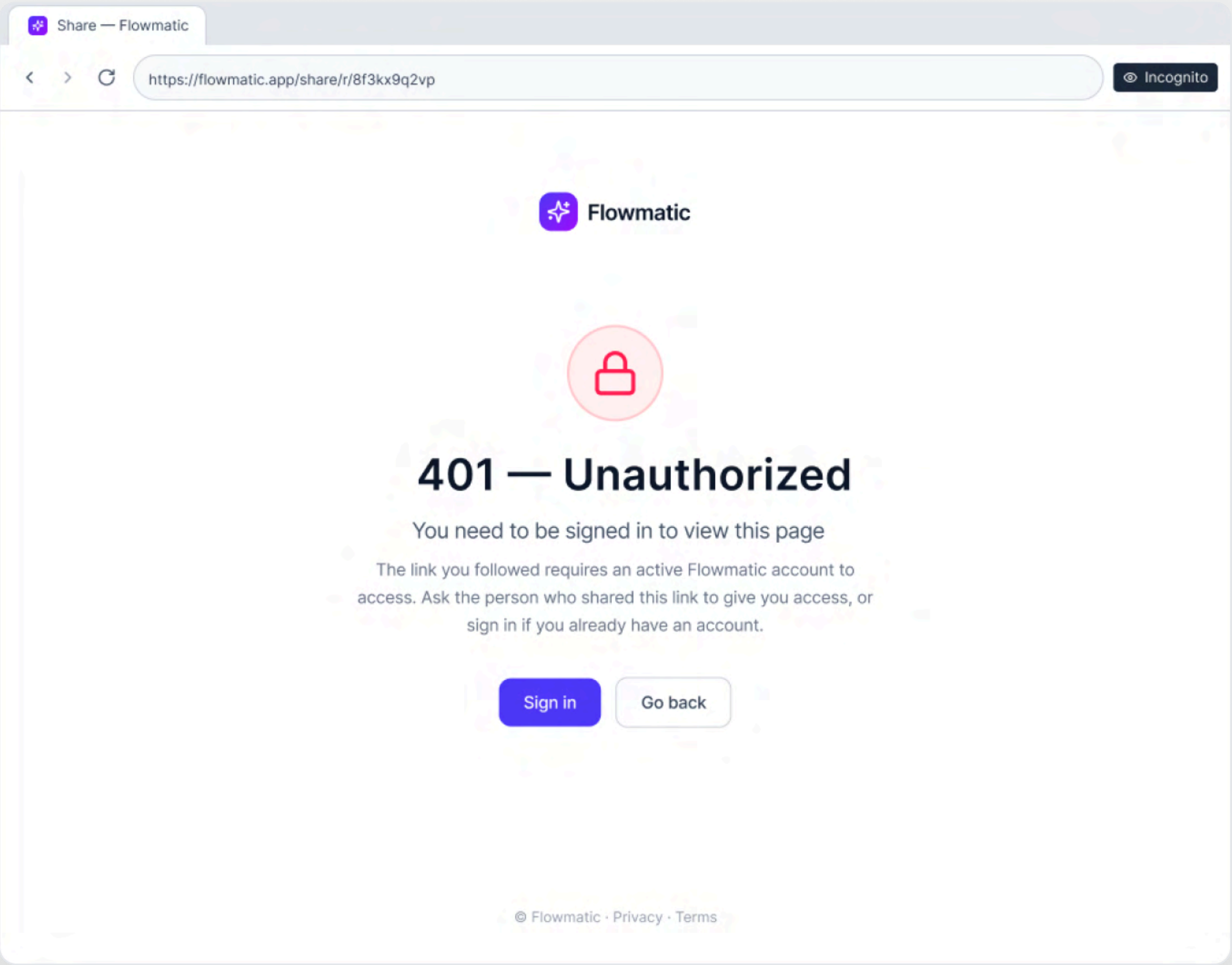
3. Detailed Findings

3.1. Issues Prioritized By Severity

#	Severity	Issue	Scenario	Success Criteria
ISS-01	 Critical	Public shareable link returns 401 Unauthorized for unauthenticated viewers	S-04	02. Error-Free Critical Path
ISS-02	 Critical	Workflow execution silently fails when data source returns empty results - no error shown to user	S-04	05. Subjective Confidence
ISS-03	 High	PDF export renders with broken layout - overlapping text, missing charts	S-04	02. Error-Free Critical Path
ISS-04	 High	Workflow activates without forcing "Test run" validation step	S-02	05. Subjective Confidence
ISS-05	 High	External integration token expiry shows generic error without recovery instructions	S-02	03. Error Recovery

3.1. Issues Prioritized By Severity

#	Severity	Issue	Scenario	Success Criteria
ISS-06	Medium	Users misconfigured workflow parameters due to unclear labels for frequency and conditions	S-02	04. Clarity of Communication
ISS-07	Medium	Role descriptions (Editor vs Admin) are ambiguous - users default to Admin	S-03	04. Clarity of Communication
ISS-08	Medium	Workflow draft auto-save indicator is missing - users unsure if changes persist	S-02	05. Subjective Confidence



3.2. Issues Detalization

Public Shareable Link Returns 401 Unauthorized For Unauthenticated Viewers

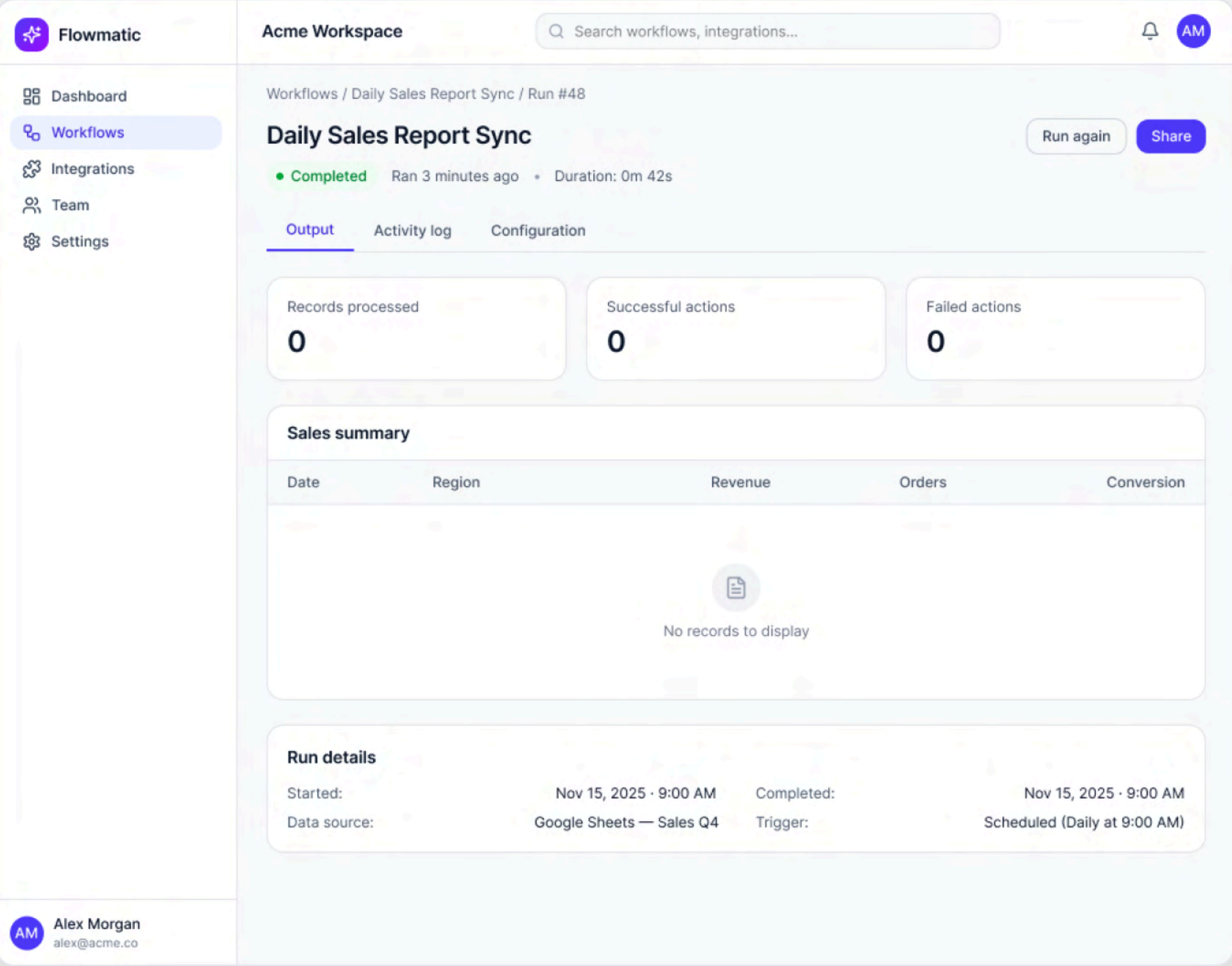
Severity	Issue ID	Affected	Scenario ID
Critical	ISS-01	4/6 users	S-04
Success criteria	Step		
02	Open the link in an incognito session		

Description

The public shareable link is the primary way users distribute workflow results to external stakeholders. Currently, accessing the link without an active session returns a "401 Unauthorized" error – completely breaking the share-with-anyone promise. 5 of 6 users hit this issue during testing and were unable to share their results without granting full account access.

Solution

Implement true public access for view-only links: bypass authentication on the backend when a valid public-link token is present. Add link-level permission settings (anyone with the link / specific domains / require password) for additional control over who can view shared results.



3.2. Issues Detalization

Workflow Execution Silently Fails When Data Source Returns Empty Results

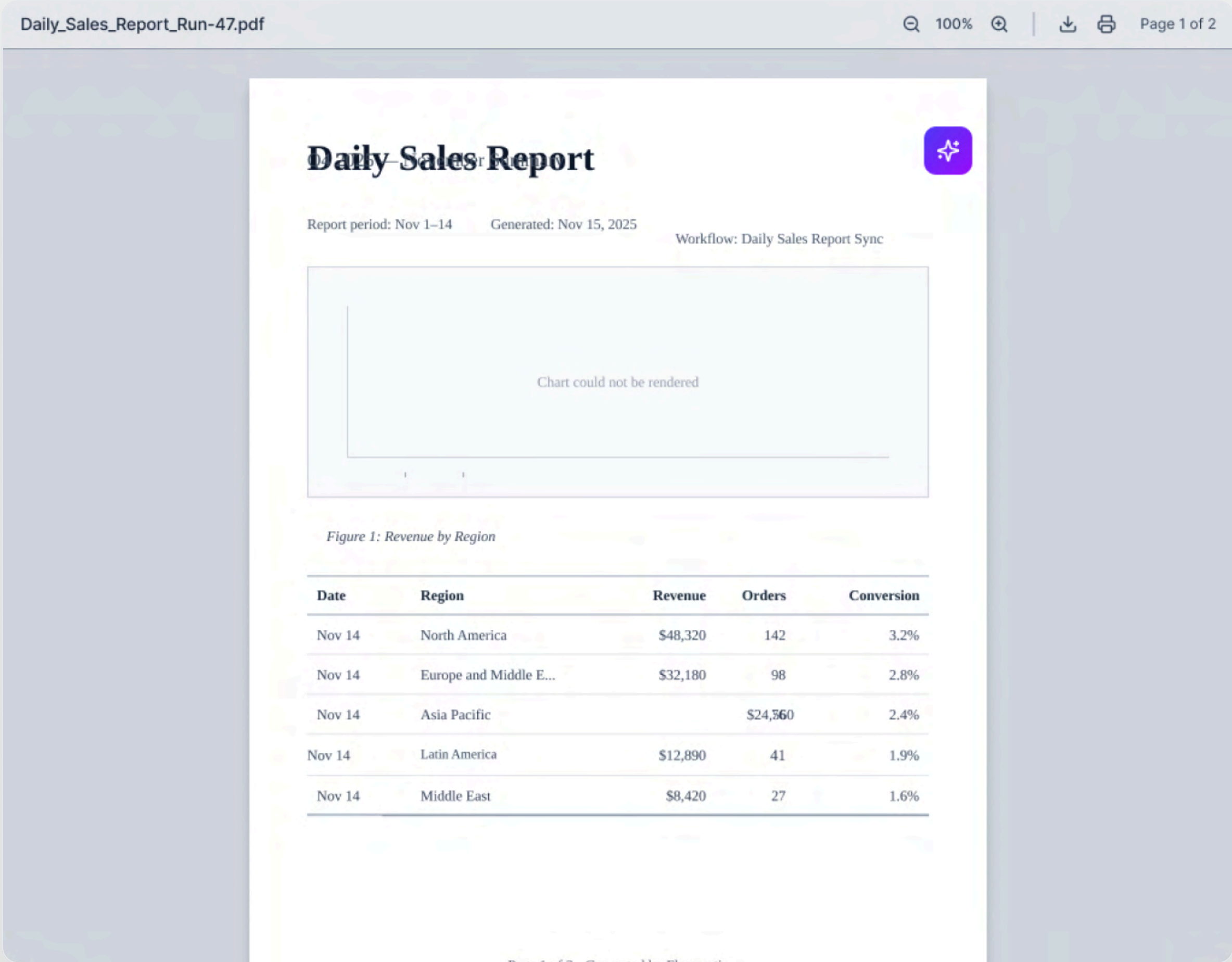
Severity	Issue ID	Affected	Scenario ID
Critical	ISS-02	4/6 users	S-04
Success criteria	Step		
05	Open the generated output		

Description

When a workflow runs against a data source that returns no results, the execution completes without any error or warning. Users assume the workflow succeeded and move on – only discovering the failure later, sometimes after sharing incomplete reports with stakeholders. 4 of 6 users encountered this scenario during testing.

Solution

Add explicit empty-result handling: show a clear notification ("No data returned for this run") in the activity log and on the output screen. Differentiate "completed with no data" from "completed successfully" with distinct visual states and badges, so users can immediately see which runs require attention.



3.2. Issues Detalization

PDF Export Renders With Broken Layout

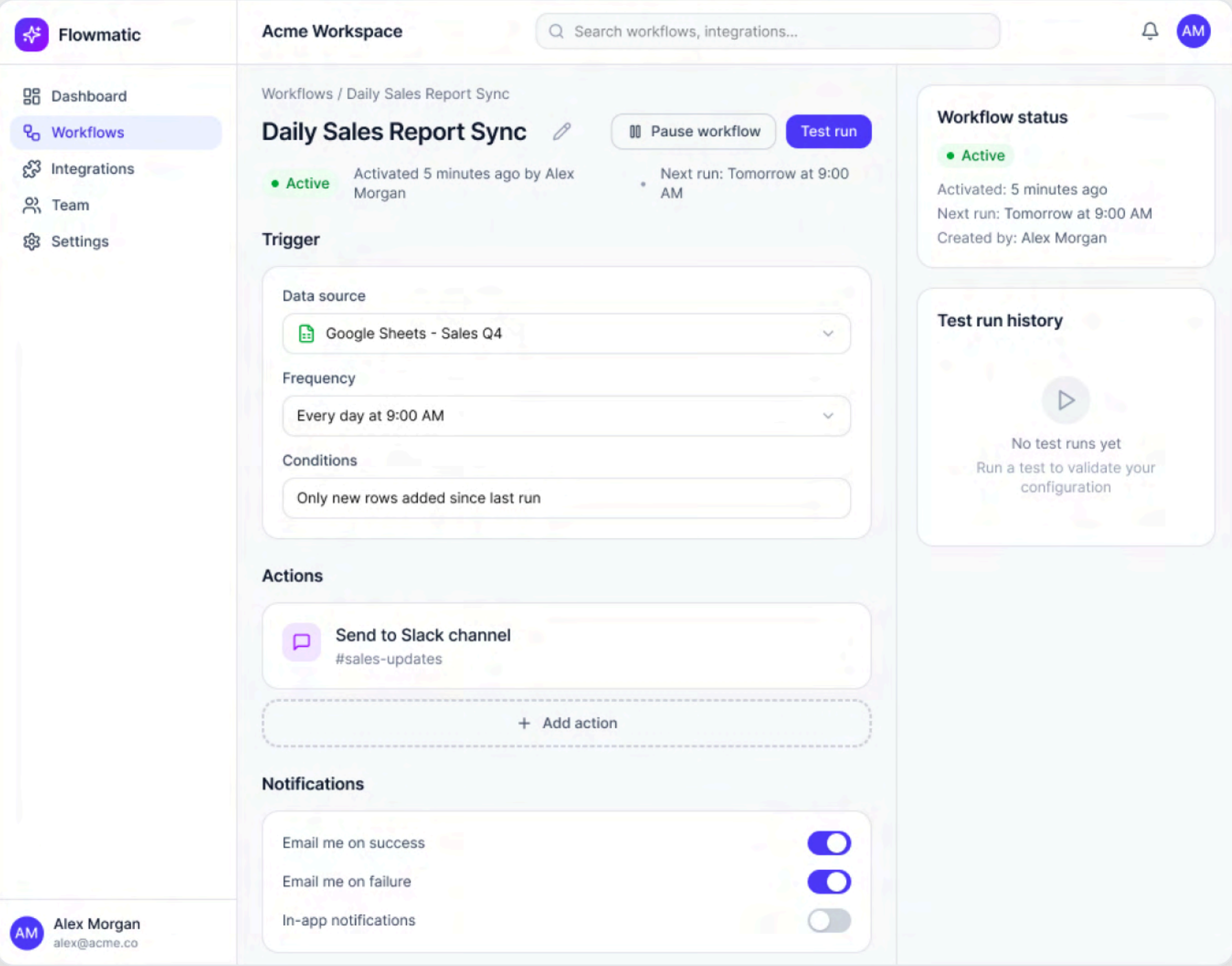
Severity	Issue ID	Affected	Scenario ID
↑ High	ISS-03	3/6 users	S-04
Success criteria	Step		
02	Export the output as PDF		

Description

The PDF export of workflow results contains overlapping text blocks and missing charts. Users can technically download the file, but the output is unusable for sharing with stakeholders — forcing them to take screenshots or rebuild the report manually. The issue undermines trust in the product's export capabilities.

Solution

Rebuild the PDF rendering pipeline with a layout-aware engine. Test against the most common report templates and chart types to ensure consistent output. Add a "Preview PDF" option before download so users see exactly what they will share with stakeholders.



3.2. Issues Detalization

Workflow Activates Without Forcing "Test Run" Validation Step

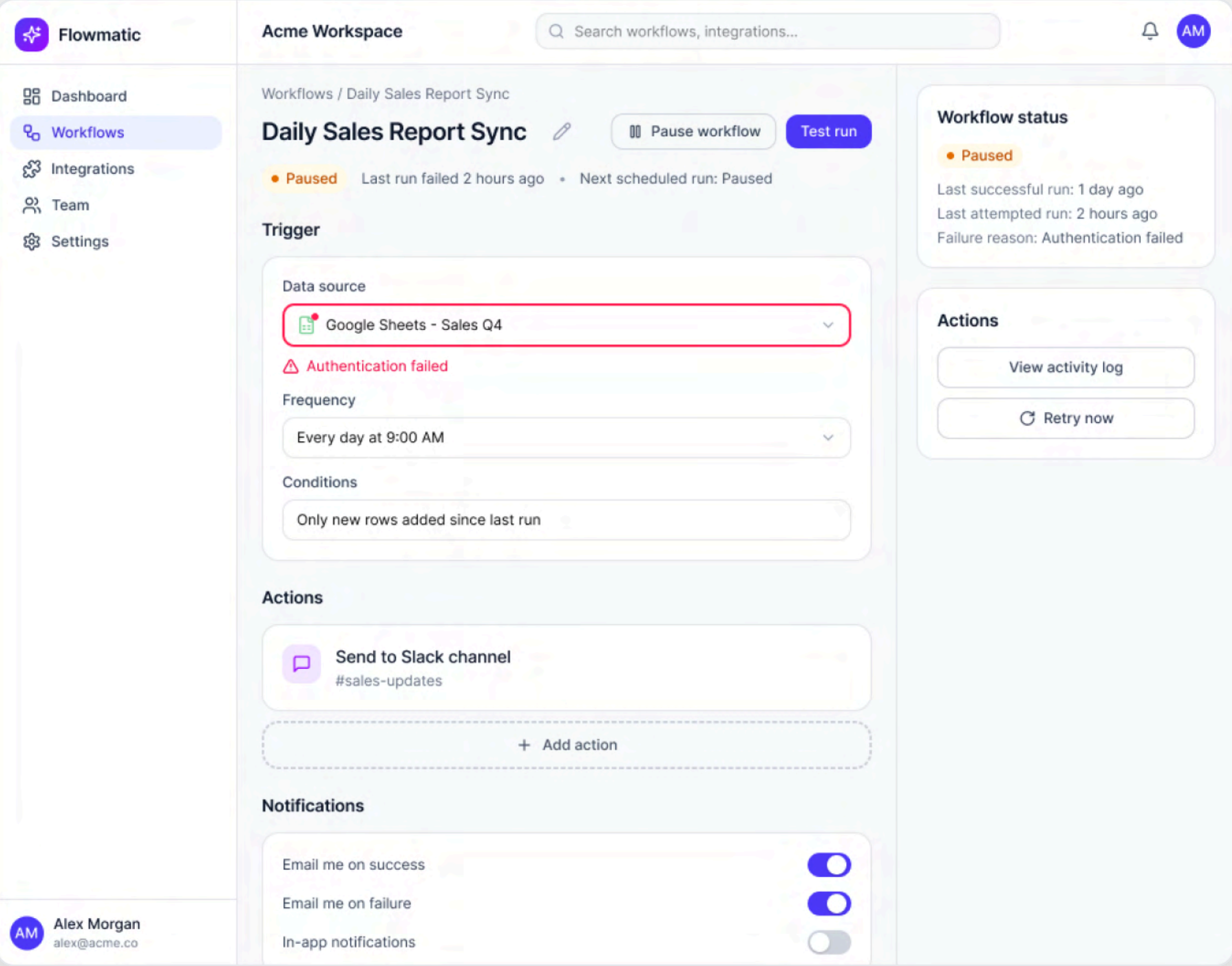
Severity	Issue ID	Affected	Scenario ID
↑ High	ISS-04	4/6 users	S-02
Success criteria	Step		
05	Activate the workflow		

Description

After saving a workflow, users can activate it directly without running a test execution first. 4 of 6 participants did exactly that — and only realized the configuration was wrong after the first scheduled run failed in production. This breaks user confidence and risks downstream errors that affect real data.

Solution

Make "Test run" a required step before activation, or surface a strong inline warning when users attempt to activate a workflow that has not been tested. Block activation only if the test run has explicitly failed, allowing users to override the warning when they have validated the configuration through other means.



3.2. Issues Detalization

Workflow Activates Without Forcing "Test Run" Validation Step

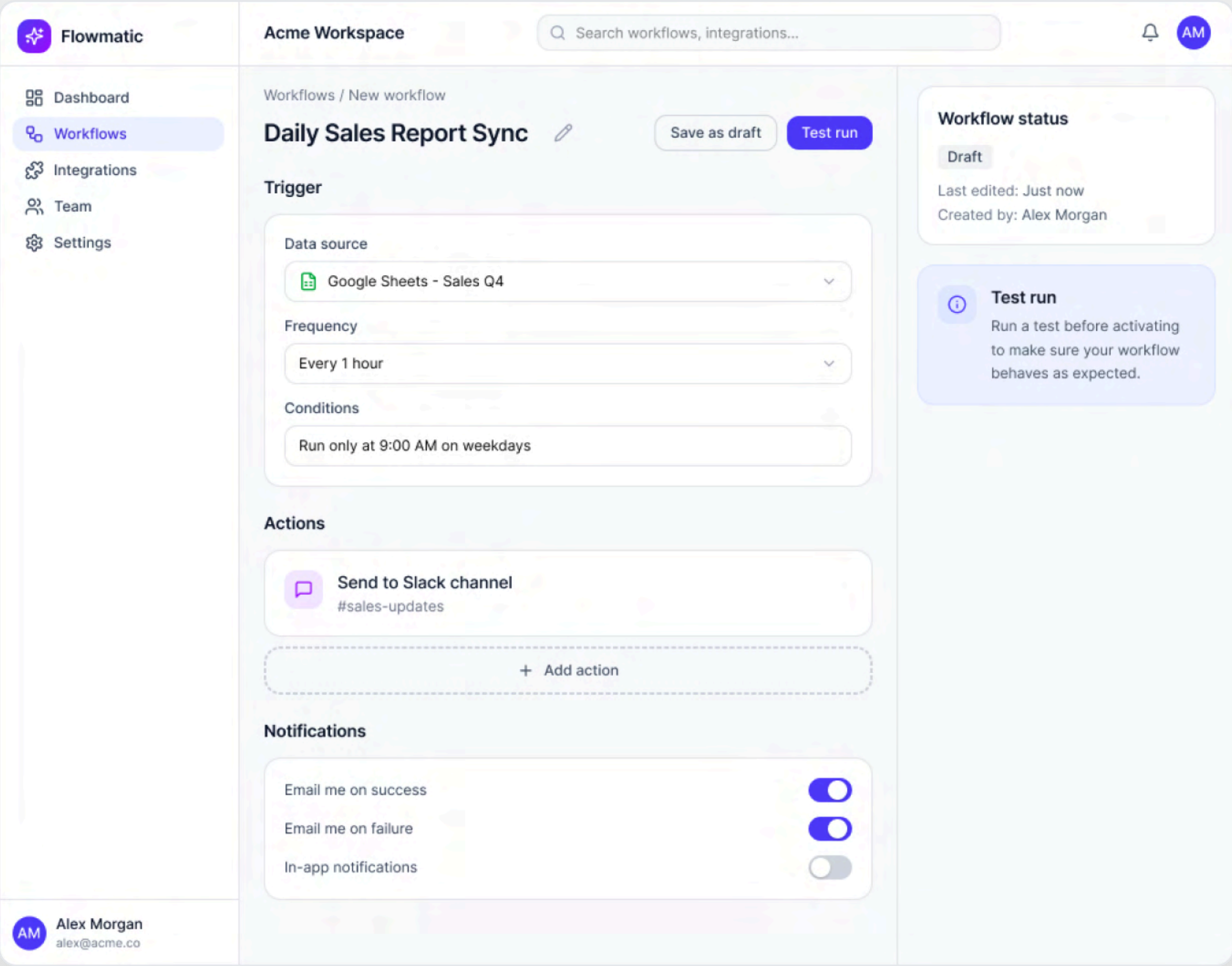
Severity	Issue ID	Affected	Scenario ID
↑ High	ISS-05	2/6 users	S-02
Success criteria	Step		
03	Configure the input parameters		

Description

When an external integration token expires, the workflow fails with a generic "Authentication failed" message. Users do not know which integration broke or how to fix it — they have to dig through settings to find the right token to refresh. This creates friction during routine maintenance and erodes trust in long-running workflows.

Solution

Replace the generic error with a specific message naming the integration and the action required ("Your Google Drive token has expired — click here to reconnect"). Add a one-click reconnect button directly in the error state, and proactively warn users in the dashboard when any integration token is approaching expiry.



3.2. Issues Detalization

Workflow Activates Without Forcing "Test Run" Validation Step

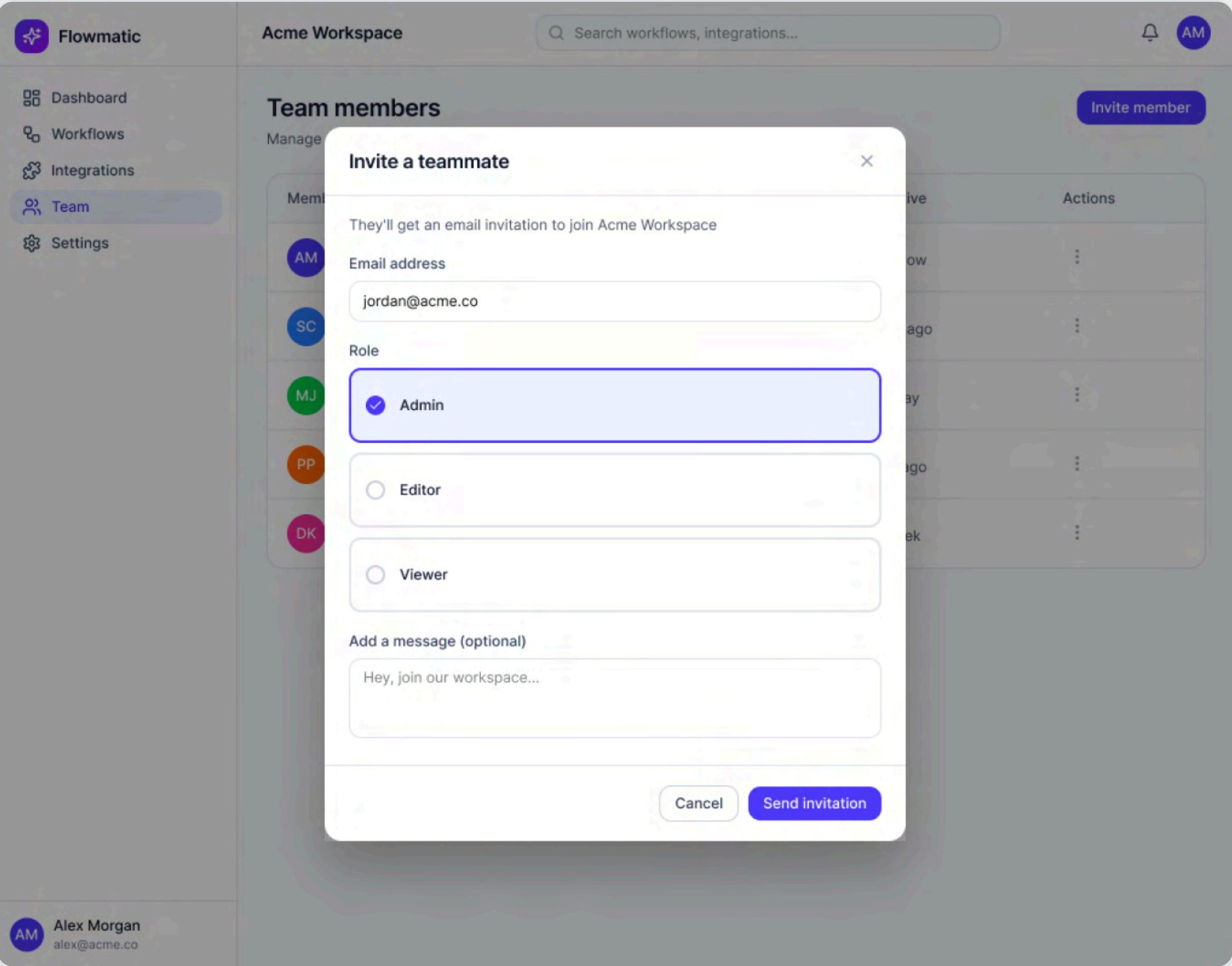
Severity	Issue ID	Affected	Scenario ID
Medium	ISS-06	2/6 users	S-02
Success criteria	Step		
04	Configure the input parameters		

Description

The "Frequency" and "Conditions" parameter labels in workflow setup do not communicate what they control. Users guess based on input field types and often misconfigure their workflow — selecting wrong intervals or conflicting trigger conditions. The misconfigurations only surface during execution, when the workflow behaves unexpectedly.

Solution

Rename labels to be action-oriented ("How often should this run?" / "When should this trigger?") and add inline tooltips with concrete examples. Show a plain-language summary of the configuration before saving, so users can verify their intent without interpreting technical terminology.



3.2. Issues Detalization

Role Descriptions (Editor Vs Admin) Are Ambiguous

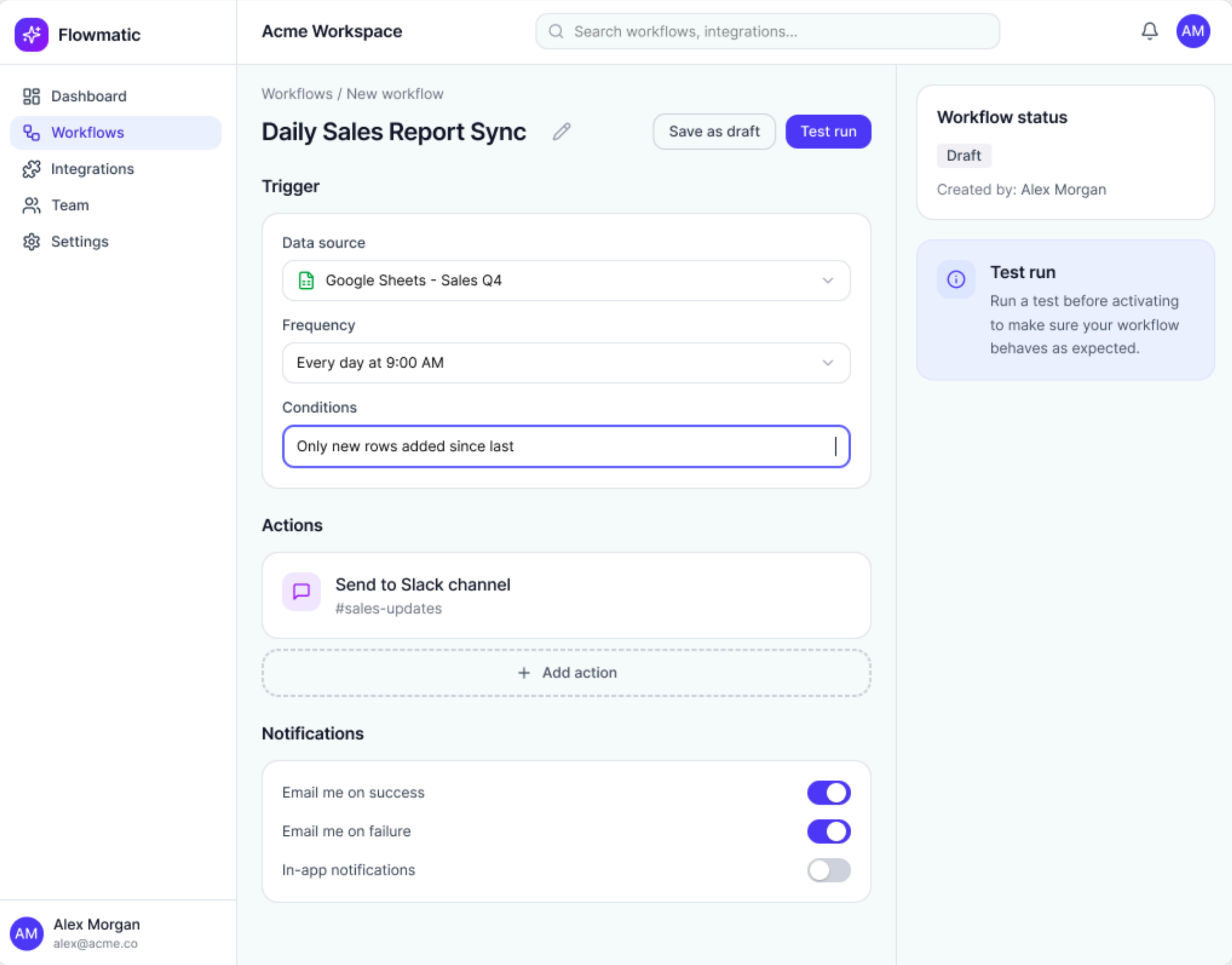
Severity	Issue ID	Affected	Scenario ID
Medium	ISS-07	3/6 users	S-03
Success criteria	Step		
04	Assign a role to the invited user		

Description

When inviting teammates, users see "Admin / Editor / Viewer" with no inline explanation of what each role can do. 3 of 6 users defaulted to Admin to avoid blocking colleagues – granting more permissions than necessary and creating potential security risks down the line.

Solution

Show a short capability summary under each role option ("Admin – full access including billing and member management" / "Editor – can create and edit but not manage members"). Recommend the least-privilege default by adding a subtle "Editor recommended for most teammates" hint near the role selector.



3.2. Issues Detalization

Workflow Draft Auto-Save Indicator Is Missing

Severity	Issue ID	Affected	Scenario ID
Medium	ISS-08	3/6 users	S-02
Success criteria	Step		
05	Save the workflow as a draft		

Description

While editing a workflow, users have no visual confirmation that their changes are being saved. 3 of 6 participants asked the moderator "did this save?" or refreshed the page to check — losing context and confidence in the product. The lack of feedback creates anxiety even when the underlying save mechanism works correctly.

Solution

Add a persistent auto-save indicator in the editor header showing current state ("Saved · 2 sec ago" / "Saving..." / "Unsaved changes"). Use a subtle but noticeable animation when saves occur. On page reload, display a brief confirmation that all changes from the previous session have been preserved.

Thank You!

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