

Userlane go-live checklist

Last Modified on 19.02.2024

Use the checklist to make sure you are considering the most relevant topics before going live with Userlane on your application.

1. Understand the difference between the Userlane Portal and Editor

With the [Editor](#), you build your Guides directly on your application. In the [Portal](#), you can customize, manage, define settings and structure your Guides and Announcements.

2. Define a structured concept

The very first step before building Guides is to define your goals and create a [clear content](#) structure to reach them. Avoid going straight into recording without planning before.

3. Make sure Userlane is implemented

- [Implementation options](#)

4. Style Userlane your way

To ensure Userlane matches the way you present and talk to your end-users, you can adjust Userlane so it matches your brand.

- [Colour configuration](#)
- [Default text configuration](#)
- [Avatar image configuration](#)
- [Welcome Slide configuration](#)

5. Visibility of Userlane

To ensure Userlane is shown where and to who it is supposed to be shown to make sure to check these settings.

- [Minimum screen size setting for whole Assistant](#)

- Page segmentation check for Guides and whole Assistant
- User segmentation check for Guides

i If your Assistant is not visible to your users, [have a look at this checklist!](#)

6. Languages

Define in what languages your Guides and Assistant should be available.

- Translations available
- Languages published
- Languages tested

7. Content & Communication

Make sure you have everything set up and have a clear plan on how to engage your users.

- Tooltips
- Guides created
- Guides tested
- Guides published
- Announcements
- Promotions
- NPS
- Internal communication regarding Userlane Go-Live

8. Offer support to your end-users

Make it easy for your end users to receive support and easily find what they need.

- Error notification configuration
- Search tab configuration/Integration configuration

- Support contact/Help center link configuration

9. Activate Userlane

Last but not least, make sure Userlane is switched on.

- Switch Userlane on
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