

Frequently Asked Questions (FAQ)

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This article includes the Frequently Asked Questions (FAQ), we receive from our customers.

Account

How can I change my Payment Details?

Please reach out to your Customer Value Manager.

Access to Userlane

I am having troubles logging in, what can I do?

- Check whether your credentials are correct.
- Clear your cache and cookies.
- Try logging in again.

Should you still face any issues logging in, please contact the Customer Success Team.

I have forgotten my password, what can I do?

You can reset it via this link [here](#) to initiate a Password Reset. You will receive an email to the mail address you entered if it is connected to a Userlane Account. Please also check your spam folder.

Should you still face any issues logging in, please contact the Customer Success Team.

Why is Userlane not showing / the editor is not visible?

This is the most common support question we receive. Work through these checks in order as described in our [Userlane is not showing - Troubleshooting](#) article.

What is the difference between global settings and the setting under our "application drop-down"?

The Global settings apply to all the applications that use Userlane and are listed in the Application dropdown. The settings in the Application dropdown apply to a single Application only. For more details check out [this](#) article.

Why can I not see my Guides in the assistant once I have created them?

Per default, a newly created Guide is saved under draft and with the status private. You will first have to publish it in order for it to appear in the assistant.

What do I need the Portal for when I am creating Guides?

On the Portal, you can manage your Guides, e.g. publish them, change order, move to a different chapter, set the languages, customize Global settings, e.g. texts, the position of the avatar, and designs. Additionally, you can use the Portal for Announcements, analytics, inviting team members and users.

Will Userlane run on staging and production environments?

We can configure Userlane so it runs either on staging or production or on both by allowing Userlane to be shown only on specific pages or to specific users. For testing the Guides before going live you can use the options described [here](#).

How do I make content available in only staging, not production environments?

You can allow Userlane to show only on the Staging URL or only to users who have access to the staging environment. This is usually needed for testing Guides before going live. You can read more about testing Userlane in this [article](#). About Page/ URL segmentation you can read more [here](#). About user segmentation check out this [article](#).

How do I move content from one environment to the other?

You can "unlock" the content you tested on staging for the production environment by changing the segments that were applied to Userlane and/or by rolling Userlane out to Production or you can move it to another account if applicable.

The invitation email for a new user did not arrive

Invitation emails are sent from noreply@userlane.com. Corporate email filters frequently block or quarantine messages from unknown senders. Steps to resolve:

- Ask the user to check their spam or junk folder.
- Ask your IT team to allow noreply@userlane.com as a safe sender.
- If your organisation uses a strict allowlist, add userlane.com as a permitted sending domain.

Once added to the allow list, use the Portal to resend the invitation.

Content creation

What are real-life examples of skip conditions?

Check out this [article](#) to learn more about it.

Can I go back to an older version of a Guide?

No, we recommend you be mindful of making changes to your Guides. Better make a copy of a Guide when you need to make alterations.

Is there an autosave for the Guides?

As of now, there is no autosave option available.

When do I use left clicks and when right clicks?

You can learn more about the step types [here](#).

Can two people edit a Guide at the same time?

No, by having more than one person working on the Guide you risk overwriting each others' changes.

What should I test if a guide is not working?

Please learn more about this [here](#).

How do I properly record drop-downs?

You can learn more about this [here](#).

How can I make the selection in a drop-down, not for one but for all elements?

You can either do this by repositioning the field or adjusting the code selector. You can learn more about this [here](#).

My tooltip is behind a page element or in the wrong position

Tooltips can be obscured by page elements that have a high CSS z-index value, or can appear offset if the target element uses unusual positioning. Please review our recommendations in the [Tooltips article](#).

Why is my segment not working?

Segment issues fall into three distinct categories, each with a different fix:

1. Attribute case sensitivity

Userlane user attributes are case-sensitive. If your application passes the attribute role="Admin" but your segment filters for role="admin", the segment will not match. Check that the attribute values in the Portal exactly match what your application sends.

2. Bootstrap timing

If user attributes are passed to Userlane after the snippet has already initialised, the segment may evaluate before the attributes are available. Work with your developer to ensure attributes are passed before or at the moment the Userlane snippet boots.

3. Missing Moderator permission for the Segments page

Moderator-role users cannot view or edit segments unless explicitly granted access to the Segments page. An Admin must enable this permission under Team → Roles.

Testing Userlane

How can we publish Guides to end-users for them to test?

Please check our article on that topic [here](#).

I only saw an announcement once, what can I do?

Active Announcements are shown to the users either as Popups (only once per User) or are accessible via the Assistant menu later in the Announcement Section (the bell icon). If you want to test an Announcement popup, you will need to log in with a User who has not seen it yet.

Can we reset a user to start from scratch?

We cannot reset a user and have their interaction erased. The way to go would be to create a new user (if needed for testing).

Analytics

Why is HEART not loading or showing no data?

Two causes account for the majority of HEART loading failures:

1. HEART is not activated for this property

HEART analytics must be enabled per property. Go to your application settings in the Portal and confirm that HEART is switched on. If it has just been activated, allow 24–48 hours for initial data to populate.

2. Segment size is too small — timeout

HEART queries time out when the selected segment has very few users, or when the date range is very narrow. Try broadening the segment or extending the date range. If the issue persists with a large segment, contact support.

Security & Architecture

Do you offer SOC 2?

Userlane is ISO 27001 Certified. SOC 2 is in the planning phase.

Why do I see a 401 notification?

There are two distinct types of 401 error in Userlane, and they have very different implications:

Harmless Portal 401 (no action needed)

If a user is not logged in to the Userlane Portal, a 401 message may appear in the browser console. This is expected behaviour and does not affect end-user experience or Guide playback.

Critical SSO 401 (requires immediate action)

During an active SSO (Seamless Rollout / Browser Extension) session, a 401 error indicates an expired or misconfigured authentication token. This breaks Userlane for affected end users — the Assistant will not load. Signs of a critical SSO 401:

- The Browser Extension shows an empty box or prompts login repeatedly (hourly loop).
- End users report that Userlane has stopped working since a recent SSO configuration change.
- The 401 appears alongside an SSO-related URL in the network tab, not just a Portal URL.

If you are seeing a critical SSO 401, contact support immediately and include a screenshot of the network request and the error detail.

Is Userlane impacting my performance?

Userlane should not impact the performance of your application. Should you still be concerned or notice any different behaviour, please do not hesitate to contact us for further investigation.

Branding

Can I have the "technology by Userlane" removed?

Please reach out to your Customer Value Manager.

Userlane Technology

Can I also use it on mobile, e.g. Android?

Userlane Technology is delivered in “Responsive Design”o Userlane also works on common mobile devices as long as the OS and browser versions are up to date. The creation of the Guides rather happens though on the actual online version of the application.

Can Userlane run on HTTP pages?

The underlying app needs to run with an encrypted protocol (HTTPS) to ensure a secure and encrypted communication.

Is Userlane accessible?

The Userlane Suite is WCAG 2.1 certified accessible. You can find more information [here](#).

Why is App Discovery not finding any applications?

App Discovery has two technical limitations that are not always obvious:

1. App Discovery requires the Browser Extension, not the Snippet

If Userlane is implemented via the JavaScript Snippet only, App Discovery will not detect any applications. App Discovery is a Browser Extension feature. Users must have the Userlane Browser Extension installed for App Discovery to work.

2. Only applications on the Userlane SaaS tracking list are detected

App Discovery tracks a predefined list of SaaS applications. If your users primarily use internally-built tools or SaaS products not on the list, App Discovery will return no results. Contact support to ask whether your applications are included.

Why can't the AI Assistant find my Guide content?

The AI Assistant does not read the full text of every step in your Guides. It searches only the following fields:

- Guide Title
- Intro Slide Title
- Intro Slide content

If the key information or task description is placed in step 3 or later, the AI Assistant will not find it. To optimise your content for the AI Assistant:

- Put a clear, descriptive summary of the Guide's purpose in the Intro Slide content.

- Use specific, searchable keywords in the Guide Title and Intro Slide Title.

See [How to optimise content for the Userlane AI Assistant](#) for full guidance.

Browser Extension and SSO

Why does the Browser Extension keep popping up or showing an empty box?

Three causes account for most cases:

- SSO token expiry — the extension prompts re-authentication each time the token expires, which can feel like an hourly loop. Your SSO administrator should extend the token lifetime or enable silent token refresh.
- Stuck or corrupted cookies — a stale session cookie causes the extension to show an empty box. The user should sign out from the extension, clear cookies for the Userlane domain, and restart the browser.
- Multiple browser profiles — if a user has the extension installed in more than one browser profile, session state can conflict between profiles and trigger repeated popups. The user should ensure the extension is active in only one profile at a time.

For detailed diagnostics and additional scenarios, see the [Seamless Rollout Troubleshooting](#) article.

Questions and Troubleshooting

Who can I reach out to when I have questions or need support?

In the footer of your Userlane Account, you can find the option to contact the support team with the Userlane Contact Form. You can create a support ticket there or you can reach out directly to your Customer Value Manager via email.

What if Userlane is experiencing a downtime?

You can follow our system status here: <https://status.userlane.com/> Subscribe for any updates.
