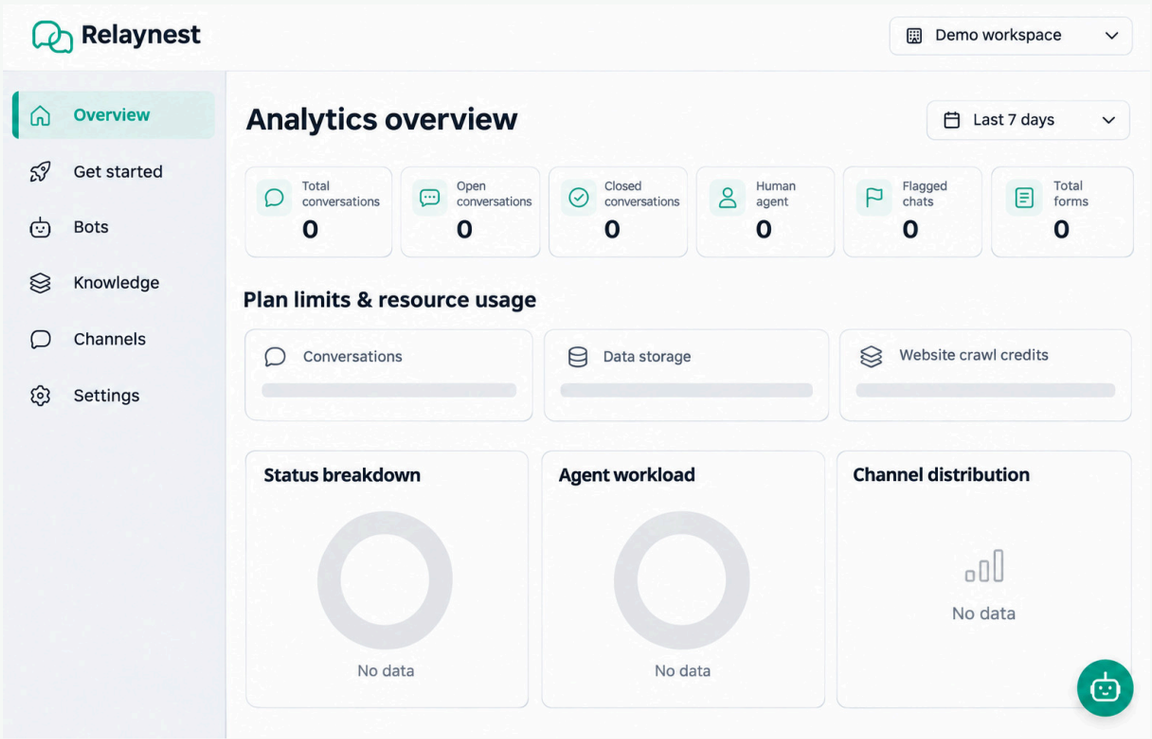
SAMPLE REPORT

Signup was easy. Learning what to do next was not.

Relaynest · First-time experience after signup.
How a new user found help, followed it, got blocked and recovered.



What this review uncovers

The first screen did not show a clear first action. The reviewer explored, found the assistant, followed its instructions and still hit a blocker. A second request for help exposed a prerequisite that should have been explained before the task began.

The practical answer

Guide the first step on the dashboard, surface help where it is needed and test whether setup answers actually work for a new account.

What you can use

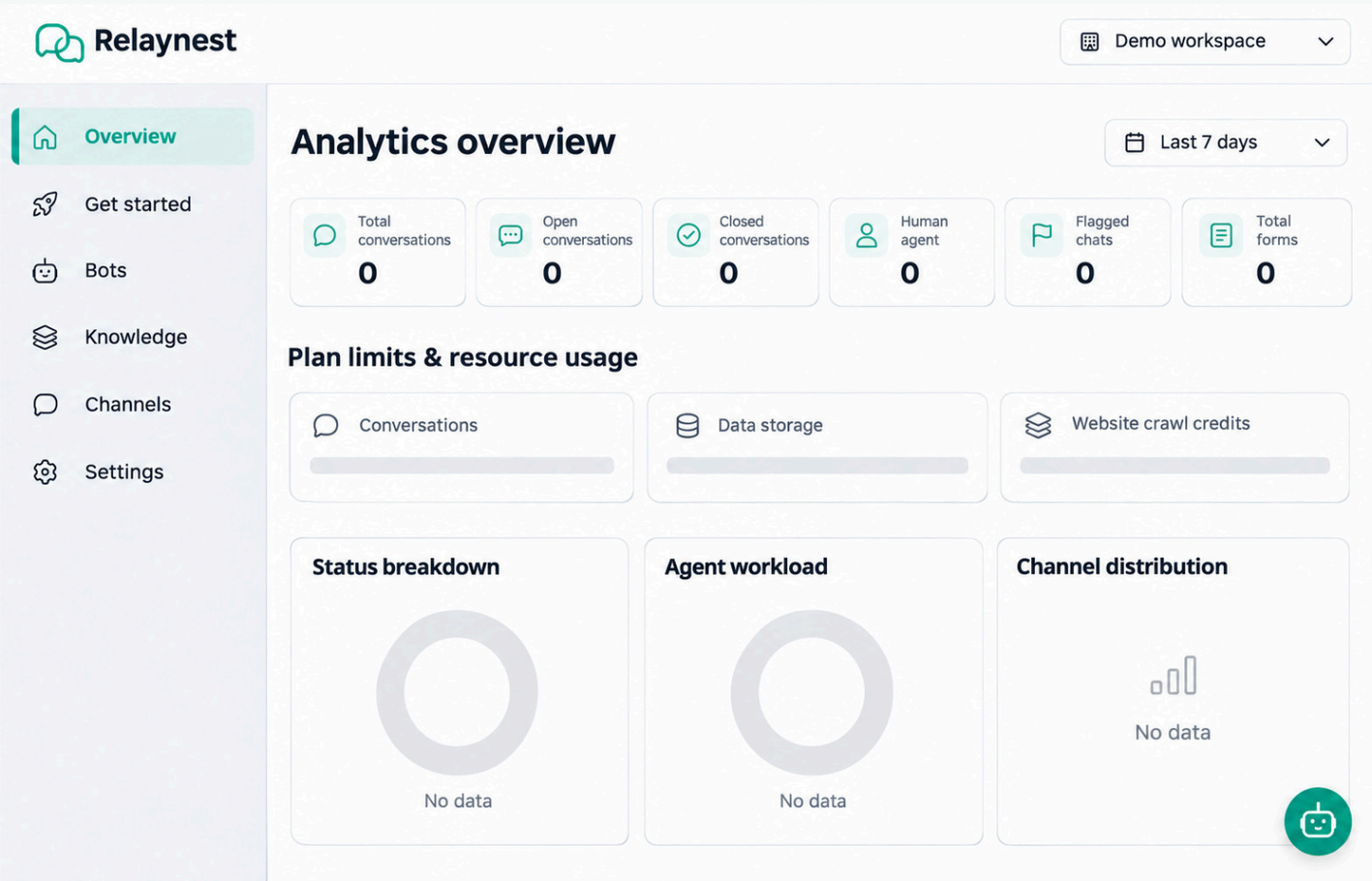
A complete journey, screen-level diagnosis, proposed UI, implementation rules and a focused retest plan.

Sample scope: one first-time setup journey. Observed behavior, interpretation and proposed changes are distinguished. Instagram authorization and live messaging were not tested.

ON SCREEN / THE FIRST DASHBOARD

Plenty of information. No obvious first action.

An account with no activity opens on analytics: zero counts, resource limits and empty charts. The interface is ready to report on work the newcomer has not started.



Two clues are present, but neither leads the main screen

Get started is visible in the sidebar and a small chat launcher sits in the corner. Their presence does not establish that a new user knows where to begin or recognizes the chatbot as setup help.

The reviewer kept exploring and found the assistant. That is evidence of this journey, not proof that ordinary customers will find or use the same route.

THE JOURNEY / BEFORE FIXING SCREENS

Follow the goal, not just the pages.

Starting point: a new account with no activity or bots. Instagram setup became the concrete task used to test whether first-run guidance worked.

01 Sign up and enter

Email-code signup was straightforward. The account opened on Analytics Overview.

Positive: getting into the product was not the blocker.

02 Look for the first action

Zero activity, empty charts and no obvious next action in the main screen.

Get started existed; the reviewer still had to work out the route.

03 Explore and discover help

The reviewer kept looking and found the chatbot.

Whether a typical customer would do the same is unverified.

04 Ask and follow the answer

The assistant sent the new user toward channel creation and bot selection.

It did not establish that a bot existed first.

05 Reach a required empty selector

The user could not choose a bot and had to describe the blocker back to help.

Navigation instructions had not resolved the setup dependency.

06 Ask again and recover

Create a test bot, return, select it and reach the Instagram connection action.

The walkthrough stopped before account authorization.

DISCOVERY / THE REVIEWER KEPT LOOKING

I found the help. Would a normal new user?

The reviewer explains that they kept exploring because they were auditing the product, and found the chatbot along the way. That persistence should not be assumed for every customer.

What is established

Email-code signup was straightforward. The first dashboard did not make the next action obvious in this journey. The reviewer explored and used the chatbot.

What remains uncertain

Whether ordinary new users notice the chatbot, understand it can help with setup, or persist long enough to find it has not been tested.

The product asked the newcomer to learn its structure

Before doing the useful task, the reviewer had to discover where setup lived and which kind of help was available. A sidebar item or a chat icon can exist without communicating “start here.” Get started was visible; its full content was not evaluated in this audit.

Make the first action explicit, then make help easy to find

Put a primary setup action on the first dashboard. Beside it, offer “Help me get started.” The assistant is an optional way to get unstuck, not a hidden prerequisite for understanding the interface.

Use relevant events, not a popup on every visit

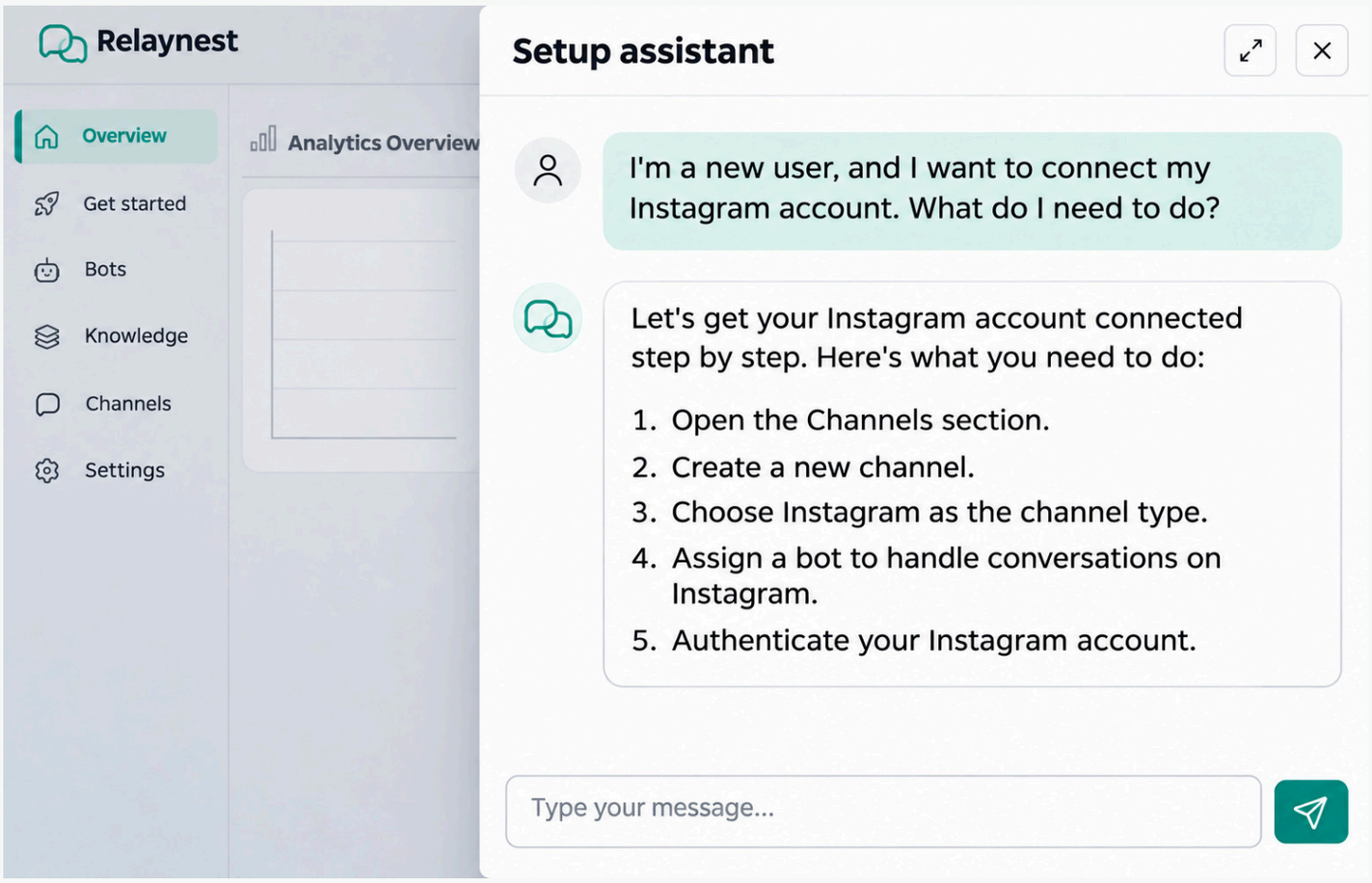
First visit with no bot: show a persistent setup card.
A required step has no available options: explain the missing object and offer contextual help.
Repeated failed attempts: offer help tied to that exact step.
After dismissal or setup progress: do not keep repeating the same prompt.

These are proposed triggers, not observed behavior. Retest with people who have never seen the product: can they identify the first action and find setup help without coaching?

ON SCREEN / THE FIRST HELP REQUEST

The advice looked complete.

The original question is preserved. The assistant’s five-step answer is condensed here without adding the missing prerequisite.



Look closely at step 4

The assistant asks a brand-new user to assign a bot. Nothing in the preceding steps creates one. A detailed-looking sequence can still be unusable for the account receiving it.

Visual focus: the question says “new user”; the answer proceeds as though the necessary bot already exists.

HELP / THE FIRST QUESTION

I told the assistant I was a new user.

The dashboard had not made the first step obvious. The next move was to ask the product itself for help.

User · exact question visible in the capture

“I’m a new user, and I want to connect my Instagram account. What do I need to do?”

Assistant · visible response, summarized

The reply opened with a friendly promise to connect Instagram step by step. It then gave this sequence:

1. **Open the Channels section**
   Go to Channels in the platform.
2. **Create a new channel**
   Click the Create Channel button.
3. **Select channel type**
   Choose Instagram.
4. **Assign a bot**
   Select the bot that will handle Instagram conversations.
5. **Authenticate Instagram**
   Follow the prompts to log in and grant permissions.

The answer sounded actionable. Step 4 was not.

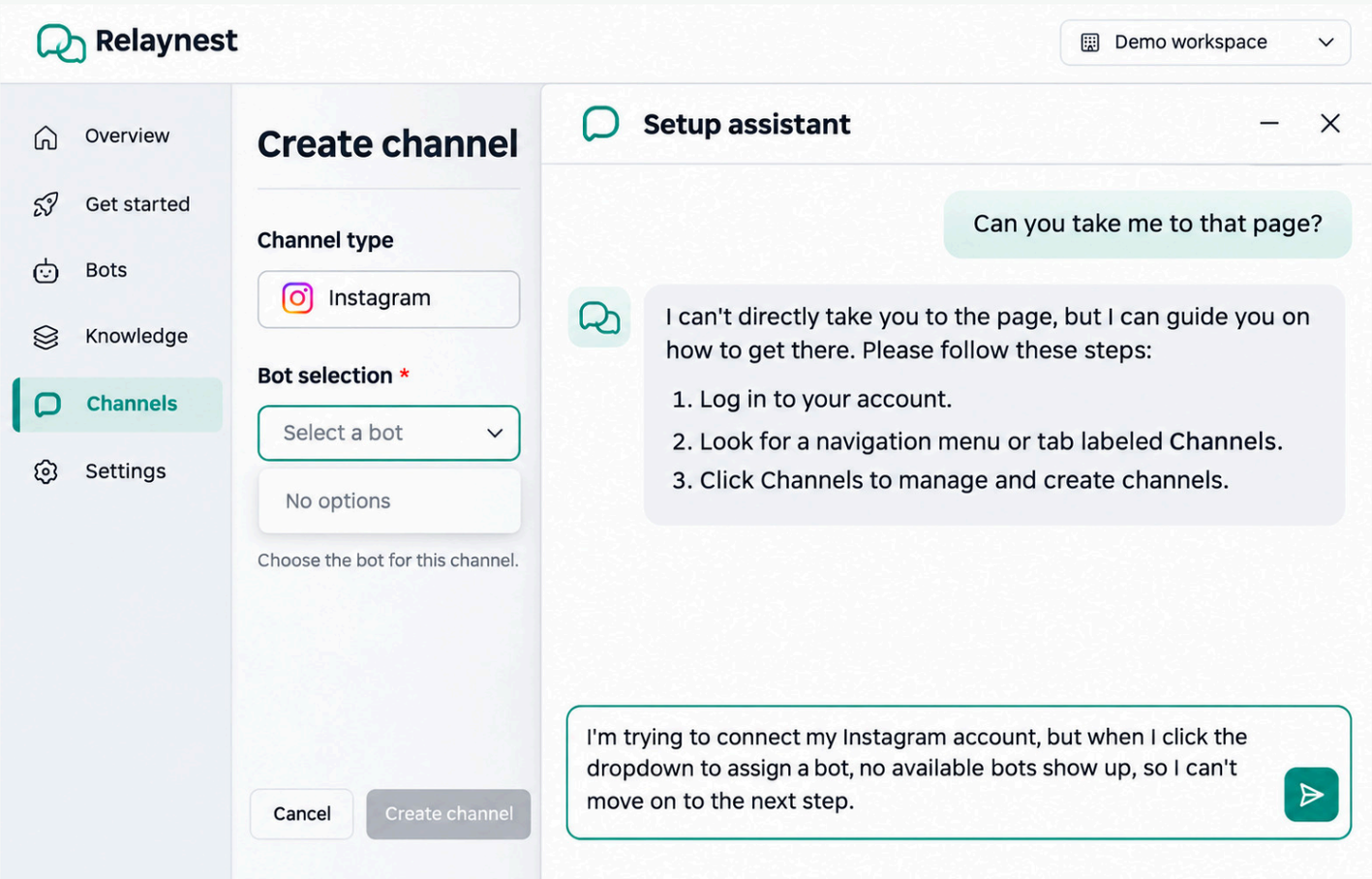
There was no existing bot. The reply described selecting one, but never told this new user to create one first. The problem was not tone or length; the sequence assumed an account state that did not exist.

Expectation, inferred: following these steps should move me toward a connected account. The visible screenshot does not show the full bottom of the response; no missing continuation is invented here.

ON SCREEN / ANOTHER REQUEST FOR HELP

The conversation continued. The dependency was still missing.

The navigation reply is condensed. The final message remains in the composer, matching the captured state rather than inventing a sent reply.



The form and the help do not meet

The form requires a bot. The chat repeats navigation directions. The user is left explaining that the dropdown has no available options instead of moving forward with setup.

The captured navigation response is not a response to the composer text. No subsequent assistant answer is fabricated.

HELP / DIRECTIONS WERE NOT ENOUGH

“Can you take me to that page?”

Exact follow-up visible in the capture. The user was asking for navigation help, not another explanation of the product.

Assistant · exact visible opening

“I can’t directly take you to the page, but I can guide you on how to get there. Please follow these steps:”

What the assistant then told the user

1. Log in to the platform.
2. Find the navigation menu or tab labelled Channels.
3. Click Channels to manage and create channels.

It offered further help once the user reached the page. This is a summary of the visible reply, not a new transcript.

What the capture shows

The Create Channel form is already open behind the chat, with Instagram selected and Bot Selection showing its placeholder.

Why the help falls short

It addresses where to click, but still does not establish whether a bot exists. Navigation guidance leaves the actual dependency unresolved.

The user’s next message was more specific

The screenshot shows this text in the composer, not a confirmed sent bubble:

User · exact text visible in the composer

“I’m trying to connect my Instagram account, but when I click the dropdown to assign a bot, no available bots show up, so I can’t move on to the next step.”

Evidence boundary: the capture establishes the drafted problem report, not its send event or the assistant’s next exact words. The audit narrative separately records asking again and then creating a test bot.

HELP / WHY THE LOOP HAPPENED

The user followed the help. Then had to diagnose its missing step.

A common first-user question must produce a usable setup path. Friendly wording alone is not enough if following it sends a new account into a dead end.

The chain of friction

Unclear first action → ask support → receive a channel-first sequence → navigate to the form → reach a required but empty selector → describe the blocker back to support → discover bot creation → leave the task and return.

Observed

The initial reply omitted bot creation. The selector had no available bot. A test bot was later created and became selectable.

Interpretation

The user has to work out whether the problem is navigation, missing setup or a malfunction. An apparently complete answer can make that uncertainty harder to resolve.

Fix the sequence before adding smarter-sounding prose

Check the prerequisite first. If account state is available, branch on bot count. If it is not available, explicitly ask the user to check Bots or provide both paths. Never pretend the assistant inspected the account.

Proposed reply · new account with no bot

“You’ll need a bot before you can create the Instagram channel. Create your first bot under Bots, then return to Channels, choose Instagram, and select it.”

This is proposed wording, not an observed assistant response.

What is higher priority than a deep link

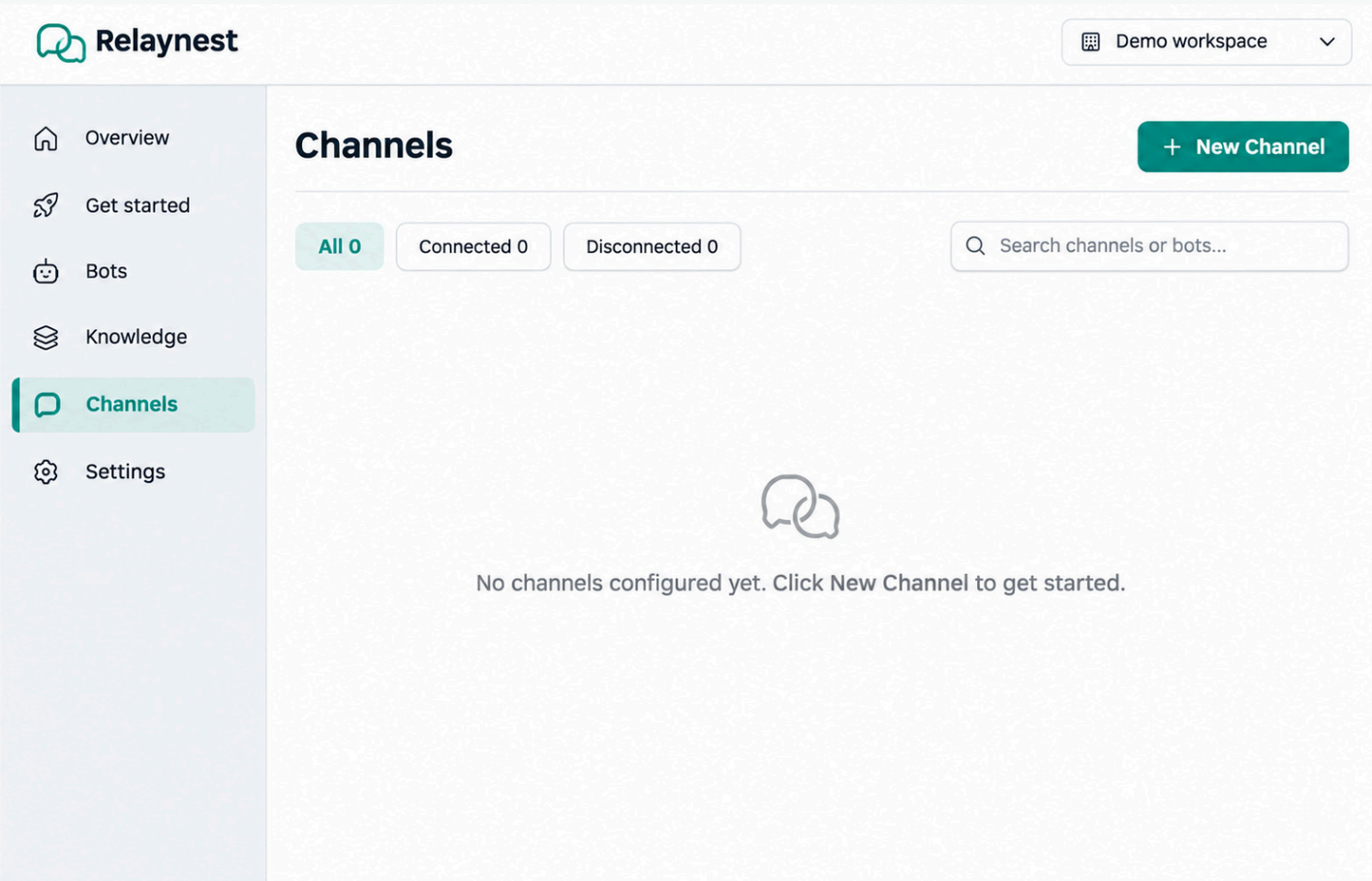
Make the empty selector recoverable without support. The assistant should reinforce a clear workflow, not be the only way to discover how the product works. Direct navigation can help later, but it will not correct the missing prerequisite by itself.

Retest: ask the same setup question with zero bots and with an existing bot. Then follow the answer literally. Does every required object exist at the step where it is requested?

ON SCREEN / FOLLOWING THE DIRECTIONS

The user found Channels. That was not the whole task.

An empty channel list offers New Channel. This supports creating a channel, but does not explain the bot that the next form will require.



One empty state led to another

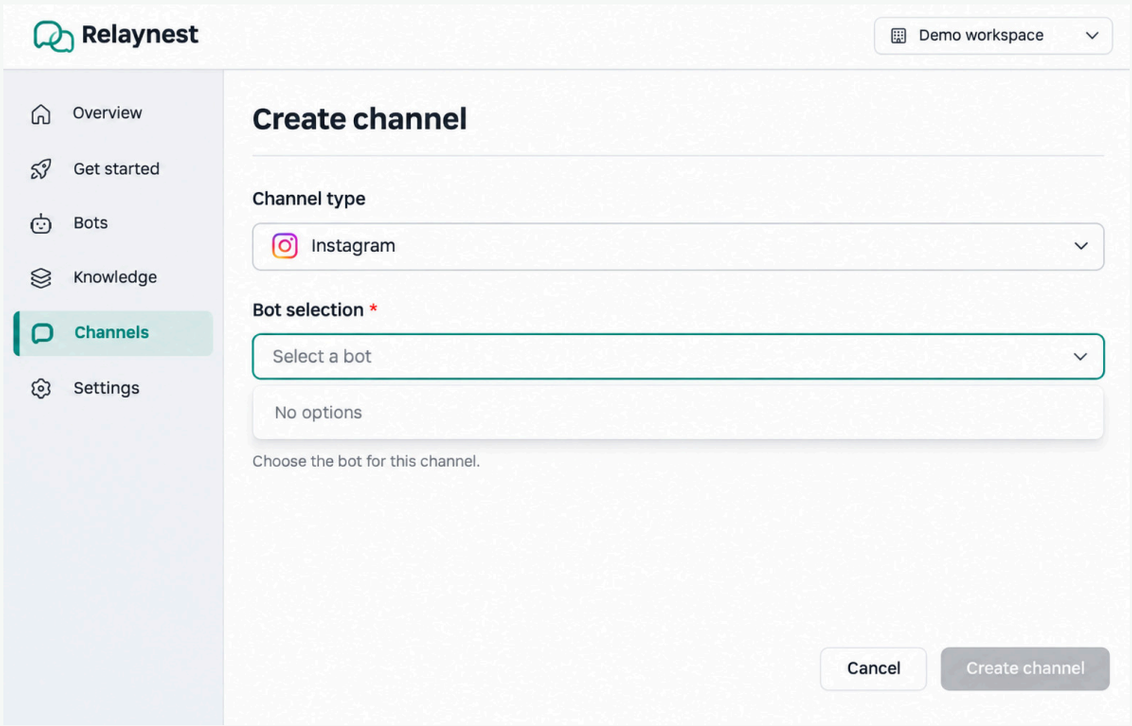
The first empty state has an action: New Channel. The next required selector has no available bot. The route is navigable, but its dependency order has not been made clear.

Preserve the visible channel-creation action. Add the prerequisite explanation before or at the point where bot selection becomes necessary.

REQUIRED FIELD / P1

The missing first step becomes a concrete blocker.

Action: Channels → New Channel → Instagram → Bot Selection. Expected: an available bot, or an explanation of how to create one.



Observed state

There was no bot to select, and the user could not continue along this route. No contextual recovery was identified in the source review.

Likely interpretation

“Did something fail to load? Am I in the wrong place? Is there another setup step?” These are inferred uncertainties, not verbatim customer quotes.

Why this outranks visual polish

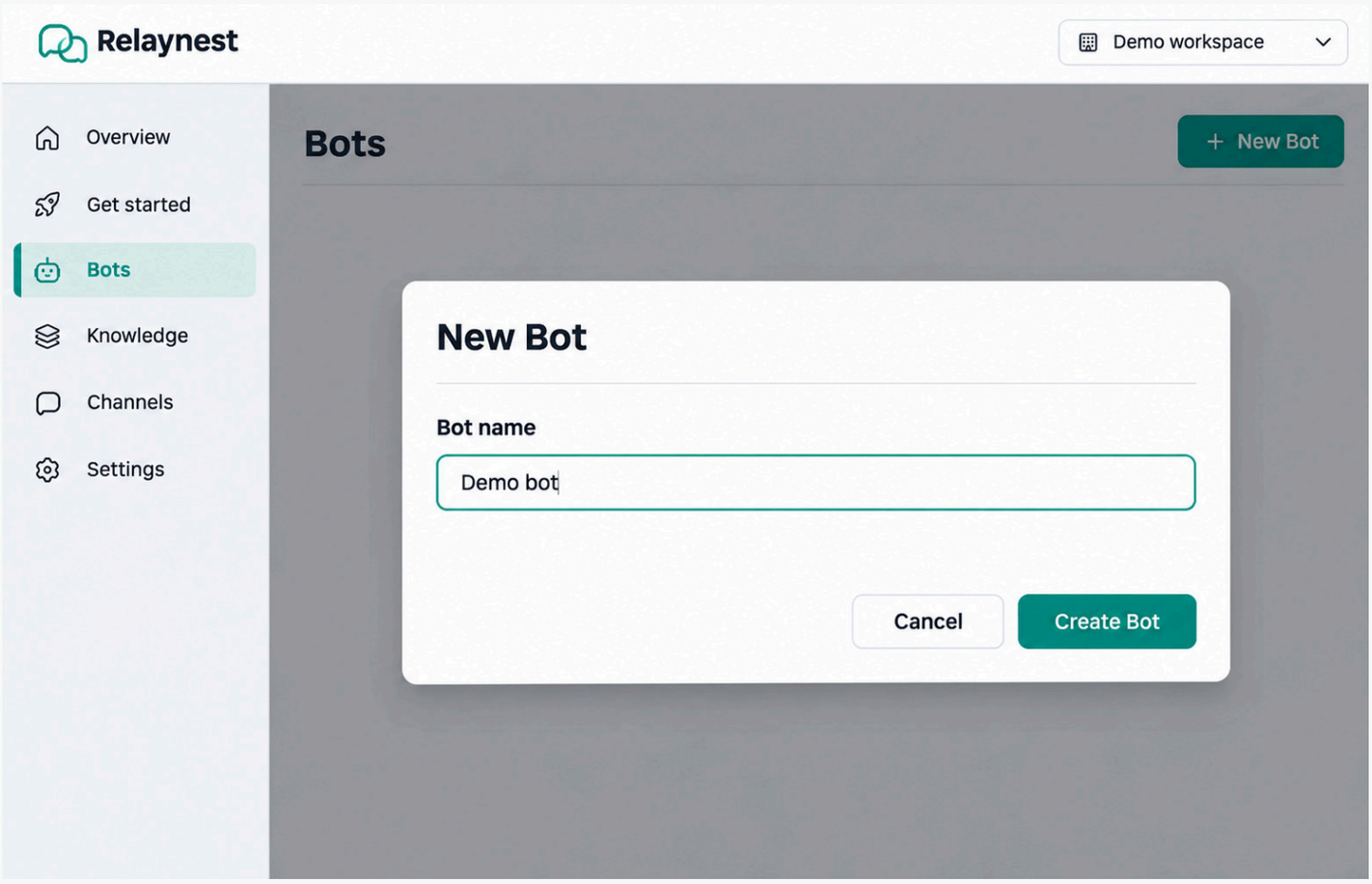
The missing explanation sits on a required step. Changing colors or adding more general onboarding content would not, by itself, tell this user how to proceed. Fix the dependency where it becomes relevant.

Do not confuse states: “No bots created” is different from loading, an API error, or no permission to access existing bots. Each needs its own message and next action.

ON SCREEN / RECOVERY STEP 1

The missing object had to be created first.

After asking again, the reviewer created a test bot. The exact intervening assistant reply is not supplied, so no dialogue is invented.



A detour that could have been anticipated

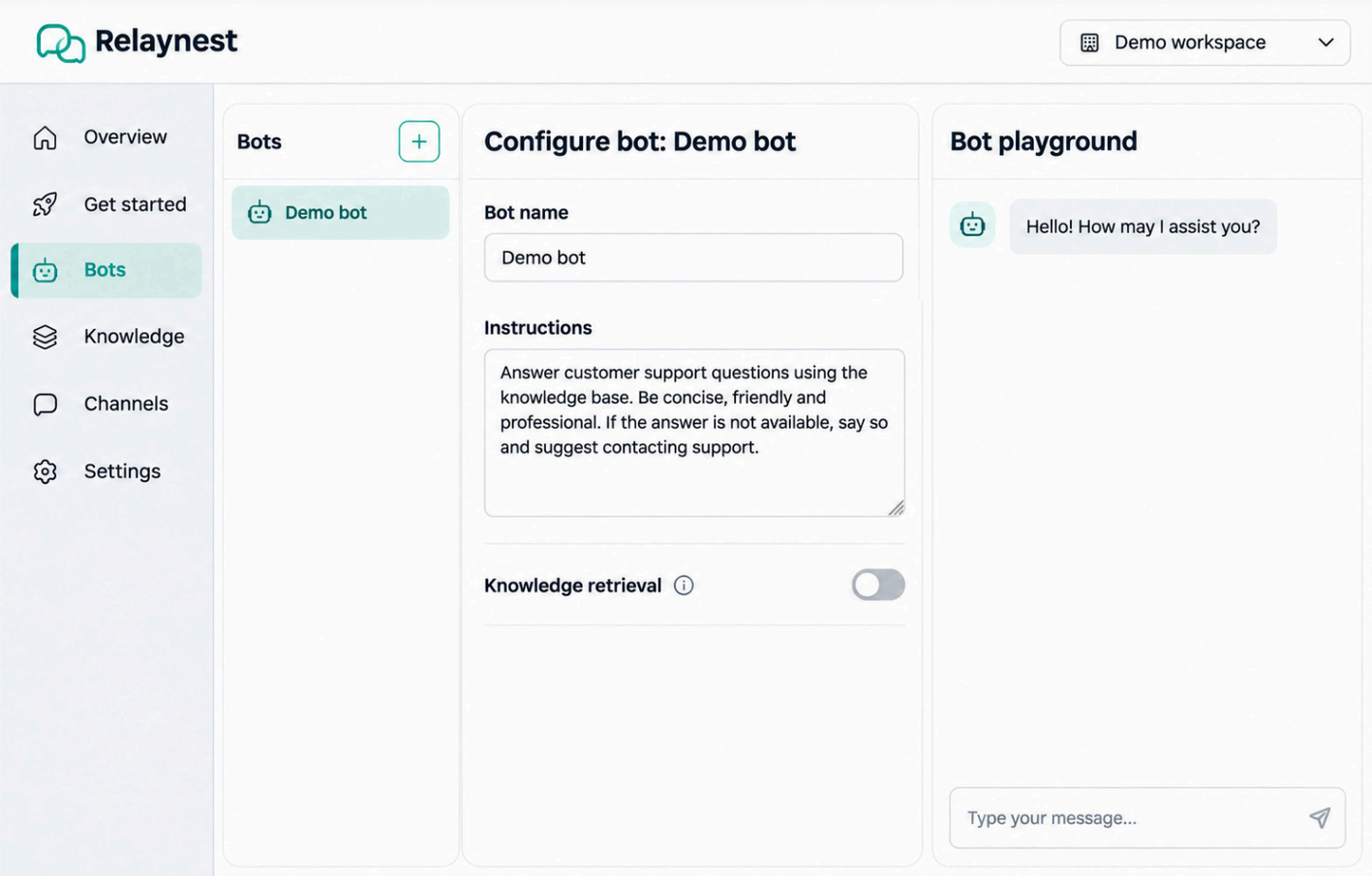
Creating the bot was a valid prerequisite. The unnecessary part was discovering it only after following a channel-first answer and hitting a required empty field.

Demo bot is the sample name for the test bot. This screen represents bot creation, not a completed channel or authenticated Instagram account.

ON SCREEN / RECOVERY STEP 2

The bot now had a place in the product.

The source captures include a bot configuration view and a simulator playground. Instruction text below is shortened for the sample.



Configuration is not proof of connection

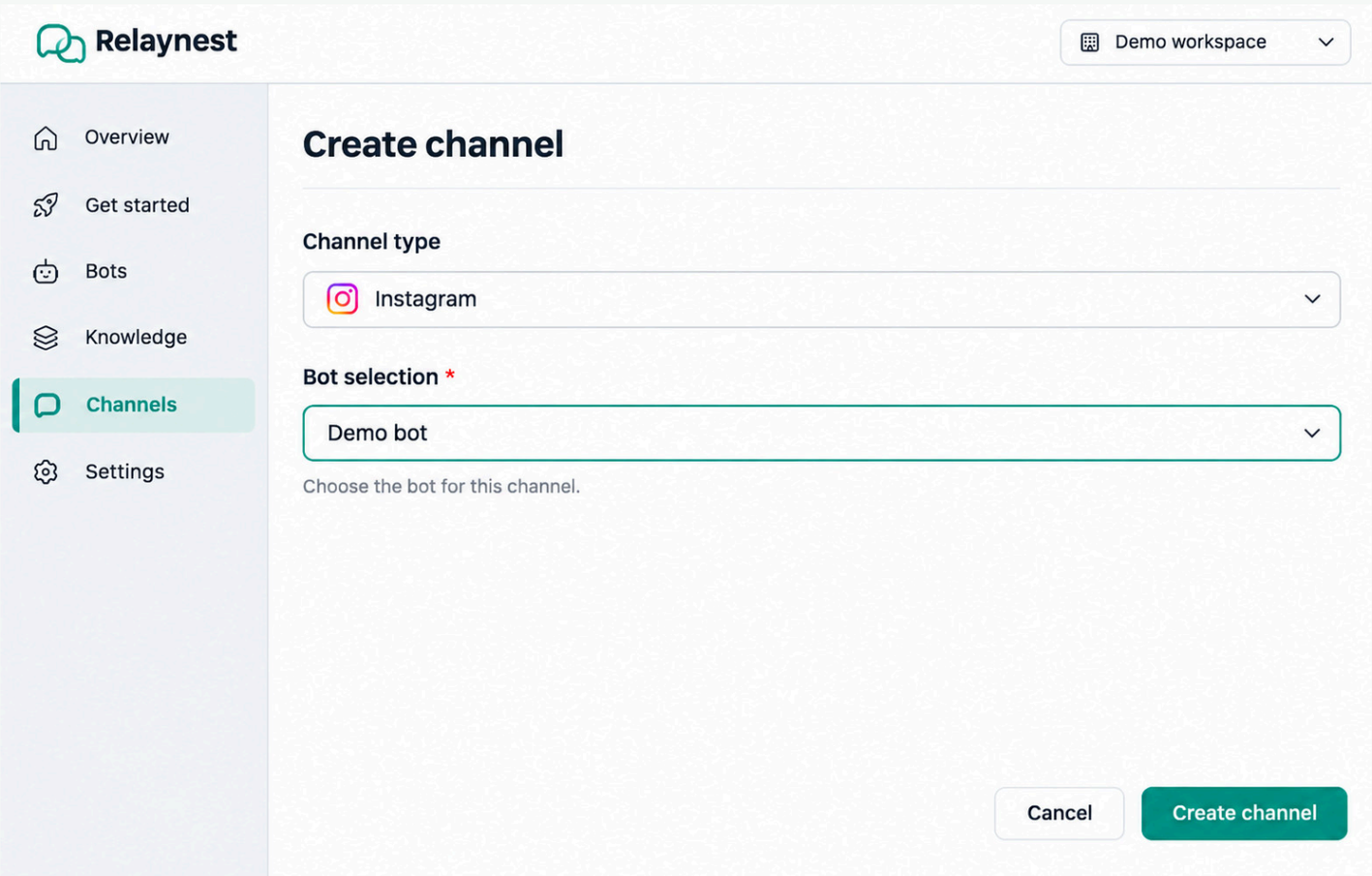
The presence of a bot and a playground gives the new object a recognizable home. It does not establish successful Instagram authorization or live automated conversations.

Only the greeting is shown in the playground. No successful test answer or customer result is invented.

ON SCREEN / RECOVERY STEP 3

Back at the same form, there was finally something to select.

After the test bot existed, it appeared in Bot Selection. The user returned to channel creation and could choose it.



The blocker was a prerequisite, not an unexplained dead end

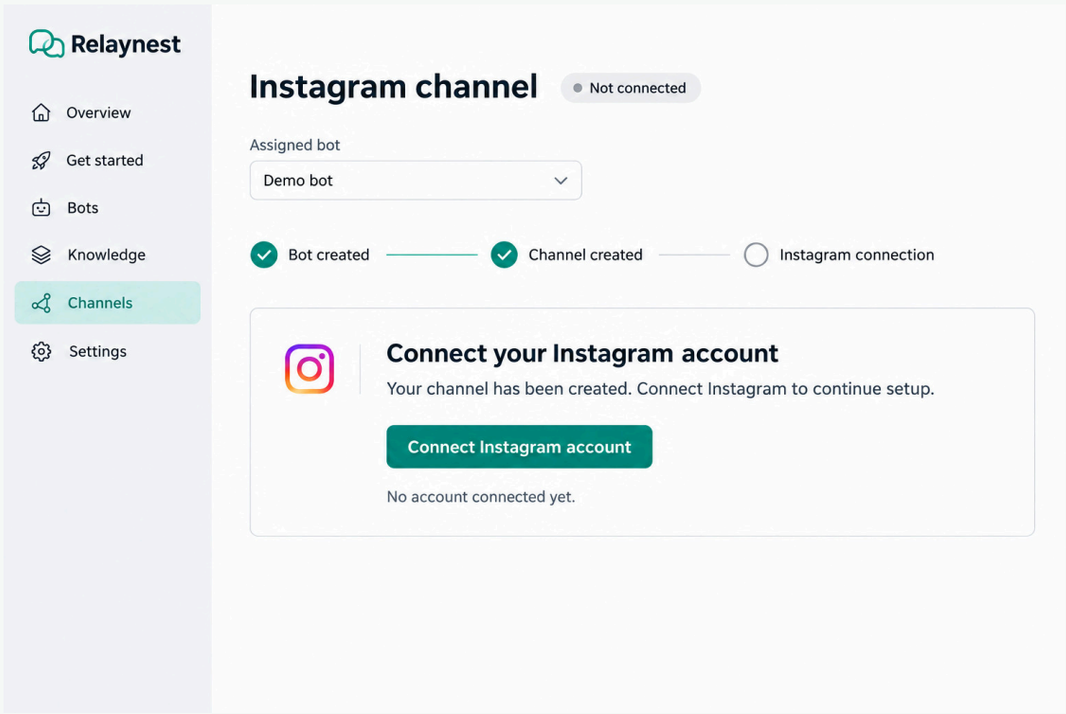
This contrast makes the diagnosis concrete: no bot existed before; a selectable bot existed afterward. The product should explain that dependency before the user needs another support question.

A selected bot is not a connected Instagram account. The next observed step was channel creation and the authentication entry screen.

RECOVERY / KNOW WHERE THE EVIDENCE ENDS

The task becomes understandable once the prerequisite exists.

Observed recovery: after a test bot was created, it appeared in Bot Selection. The user created an Instagram channel and reached Connect Instagram Account.



What worked

The new bot became available. The later connection action gave the user a recognizable next step. Preserve that clarity.

What is not established

Successful authorization, permissions handling, live messages, reply quality and a complete end-to-end connection were not tested.

Do not collapse these statuses

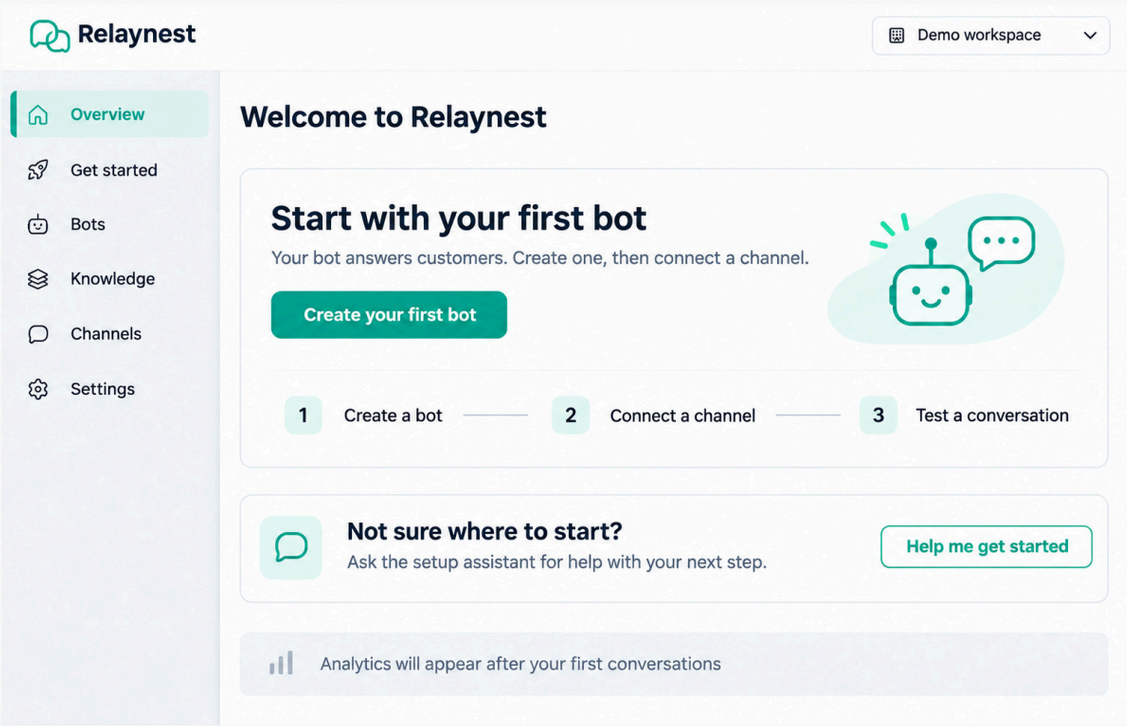
A bot exists ≠ a channel exists ≠ Instagram is connected ≠ a live conversation has worked. Use separate completion states so neither the interface nor support claims success too early.

The illustrated progress row is a proposed clarity improvement. It is not evidence that these status indicators existed in the original product.

PROPOSED FIRST SCREEN / P1

Show the first action. Make help an obvious second option.

Proposed first-run dashboard. Keep the path usable without chat; make the assistant discoverable for users who need guidance.



One clear primary action

The setup card explains what to create first and why. It does not make the user infer the dependency from empty analytics.

Help where it is relevant

A visible setup-help action tells newcomers what the assistant is for. It supplements the main path instead of replacing it.

Proposed state logic

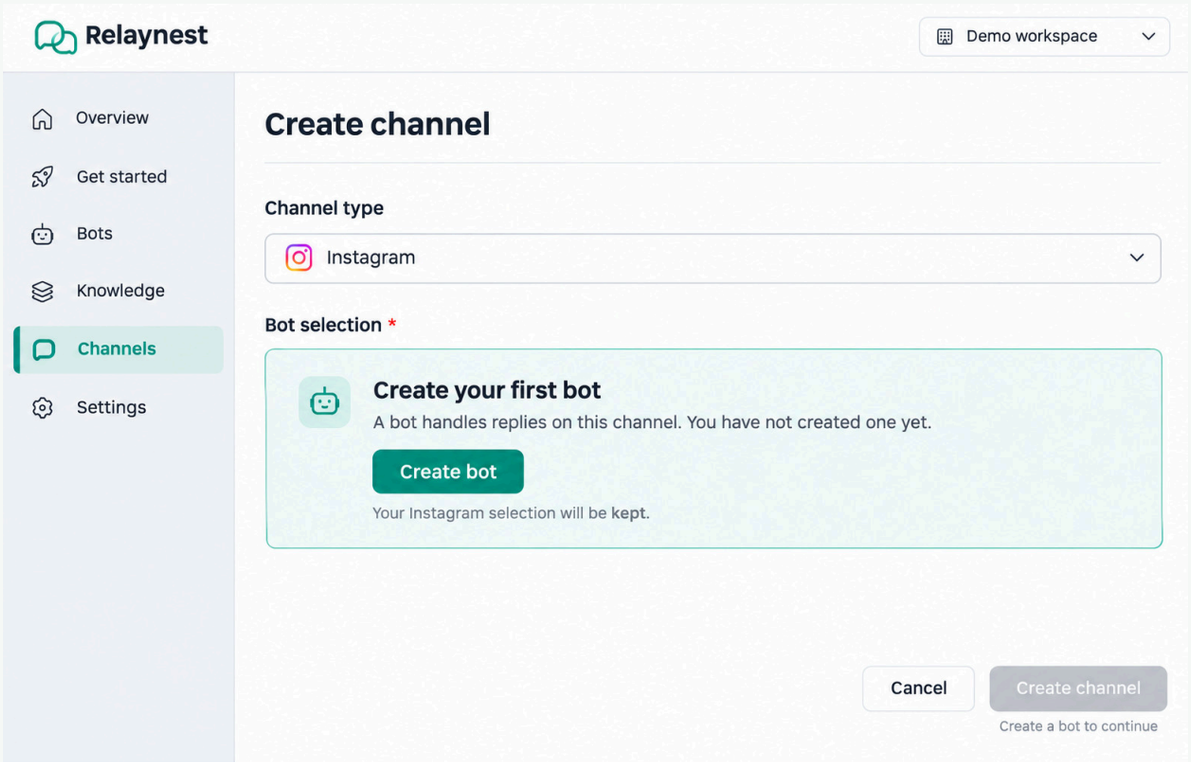
No bot → highlight Create bot.
Bot exists, no channel → highlight Connect a channel.
Channel created, not authorized → highlight Connect Instagram.
Connected state → expose an appropriate test step only after the integration supports it.

Verify before implementation: inspect the existing Get started flow. Reuse its working pieces rather than introducing a competing setup route.

PROPOSED FIX / UI AND BEHAVIOR

Explain. Create. Return.

Proposed interface, not an implemented result. The underlying requirement remains: a channel needs a bot.



Make the next action local

Replace the empty required selector with “Create your first bot,” explain why it is needed, and offer the action beside the explanation. Keep the selected channel visible so the user knows the original task has not been lost.

On successful creation

Return to the saved channel form, refresh available bots and select the new bot. Let the user confirm channel creation.

On cancel or failure

Keep the selected channel. Do not mark the step complete. Show a retry or a clear route back without making the user restart.

Important condition: the original walkthrough involved a manual return. Automatic selection, preserved form state and inline recovery here are recommendations, not observed existing capabilities.

IMPLEMENTATION / WHAT YOU WOULD DO NEXT

A focused fix list, not a redesign wishlist.

Priorities reflect severity in one qualitative walkthrough. They are not measured revenue forecasts.

P1 · Make the first step visible

Show a primary setup action on the empty dashboard; inspect and reuse Get started.

Retest: Newcomers can identify what to do first without exploring every menu.

P1 · Test common setup answers

Include prerequisites and distinguish empty from already-configured accounts.

Retest: Follow the assistant’s answer literally from a fresh account: each step is possible.

P1 · Fix the required empty state

Explain why there is no bot and provide a creation route that preserves the task.

Retest: Users can recover without diagnosing the product or asking support again.

P2 · Surface contextual help

Offer setup help on first entry or at a relevant blocker; respect dismissal and progress.

Retest: First-time users can find help without being interrupted on every visit.

P2 · Preserve recovery continuity

After bot creation, return with the new bot selected; keep distinct connection states.

Retest: Success, cancel and failure paths preserve intent and do not claim false completion.

Your takeaway: a new customer should not need an auditor’s patience. Make the first step visible, help discoverable and its instructions reliable enough to follow.