TEST REPORT · UX / USABILITY

● 4 HIGH-PRIORITY UX ISSUES

Acme Ledger · Invoicing and customer portal

Method	Moderated remote usability tests (think-aloud) + heuristic review (Nielsen's 10 heuristics)
Participants	8: 4 finance staff at existing customers, 4 trial users
Tasks	10 realistic tasks, same order for everyone, 50-minute sessions
Build	Staging 4.2.0-rc2, desktop Chrome; T6 also on mobile Safari
Sessions	14 Oct 2026 – 17 Oct 2026 · recordings with consent
Moderator and analysis	Tomasz Kordiak

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Summary

Everyday work is easy: creating and sending an invoice and paying in the portal were completed by all 8 participants and rated easiest. The trouble is in tasks that matter at month end: recurring invoices (3 of 8 unassisted) and credit notes (2 of 8).

SUS is **71** (the commonly cited average is 68). The four high-priority issues are mostly about where actions live and what errors say, not missing features.

Top recommendation

Put **Repeat this invoice** and **Credit this invoice** on the invoice page. 7 of 8 participants looked there first.

Key numbers

74% Unassisted task success	**59/80** Tasks completed alone	**10** Completed with help	**11** Not completed	**71** SUS score

5.1 / 7 Average ease (SEQ)

Defects bugs found during sessions

KEY	SUMMARY	SEVERITY	STATUS	COMPONENT	FOUND BY	OWNER	CREATED
ACME-535	SVG logo upload fails silently	Medium	Open	Settings	T10	Frontend	16 Oct
ACME-536	Date picker shows MM/DD while lists use DD/MM	Medium	Open	UI	Heuristic	Frontend	16 Oct
ACME-537	Expired invite link shows 'Something went wrong'	Low	Open	Auth	T9	Frontend	16 Oct
ACME-538	Report filters reset when switching tabs	Low	Open	Reports	T8	Frontend	16 Oct
ACME-539	Bulk send limited to one page of results without warning	Low	Open	Invoices	Heuristic	Frontend	17 Oct

Observations

ID	AREA	OBSERVATION	IMPACT	SUGGESTED ACTION
`OBS-01`	Strength	Creating and sending an invoice (T1) and paying in the portal (T6): 8/8 success, rated easiest.	Positive	Don't change these flows.
`OBS-02`	Segments	Trial users succeeded as often as long-time customers; existing customers were faster but relied on habits.	Info	Onboarding isn't the main problem; task design is.
`OBS-03`	Mental model	7 of 8 started secondary actions (credit, repeat, refund) from the invoice page.	High	Put actions on the object they act on (UX-01, UX-02).
`OBS-04`	Mobile	Portal on mobile worked for all 8; one needed to scroll to find 'Pay now'.	Low	UX-13.
`OBS-05`	Trust	3 participants double-clicked Send because nothing happened at first.	Medium	UX-09; also check idempotency on the API.
`OBS-06`	Help	No participant opened the help centre; 2 searched Google instead.	Info	Contextual help links where people get stuck.

Results by task

TASK	SUCCESS	ASSISTED	FAILED	MEDIAN TIME	EASE (1–7)	MAIN PROBLEM
T1 · Create and send an invoice to an existing customer	8/8	–	–	2 min 10 s	6.2	–
T2 · Set up a monthly recurring invoice	3/8	2	3	5 min 40 s	3.4	Schedule options hidden behind 'More'
T3 · Record a partial payment	5/8	1	2	1 min 50 s	4.8	'Mark as paid' assumes the full amount
T4 · Issue a credit note for one line	2/8	2	4	4 min 05 s	2.9	Started from the Credit notes page

TASK	SUCCESS	ASSISTED	FAILED	MEDIAN TIME	EASE (1–7)	MAIN PROBLEM
T5 · Find last month's unpaid invoices	7/8	1	–	1 min 15 s	5.7	Filter label 'Period' unclear
T6 · Pay an invoice in the customer portal (as a customer)	8/8	–	–	1 min 30 s	6.5	–
T7 · Turn on payment reminders	6/8	1	1	2 min 20 s	5.1	Settings vs per-customer toggle
T8 · Export last quarter's revenue to Excel	7/8	1	–	1 min 05 s	5.9	Export button only in the report view
T9 · Invite a colleague as Accountant	6/8	1	1	1 min 40 s	5.2	Role descriptions missing
T10 · Put your logo on invoices	7/8	1	–	1 min 25 s	5.8	SVG upload fails silently

Success = completed without help. Ease = Single Ease Question after each task (7 = very easy).

Participant × task

TASK	P1	P2	P3	P4	P5	P6	P7	P8
T1	✓	✓	✓	✓	✓	✓	✓	✓
T2	✓	✗	A	✗	✓	✗	✓	A
T3	✓	✓	✗	✓	A	✓	✗	✓
T4	✗	A	✓	✗	✗	✓	✗	A
T5	✓	✓	✓	A	✓	✓	✓	✓
T6	✓	✓	✓	✓	✓	✓	✓	✓
T7	✓	✓	A	✓	✓	✗	✓	✓
T8	✓	✓	✓	✓	A	✓	✓	✓

TASK	P1	P2	P3	P4	P5	P6	P7	P8
T9	✓	✓	✓	A	✓	✓	✗	✓
T10	✓	A	✓	✓	✓	✓	✓	✓

80 task attempts. ✓ success · A assisted · ✗ not completed.

Participants and SUS

ID	ROLE	TYPE	USING ACME	TASKS ALONE	SUS
P1	Finance manager	Existing customer	4 years	9/10	72.5
P2	Bookkeeper	Existing customer	2 years	7/10	65
P3	Office manager	Existing customer	1 year	7/10	80
P4	Finance manager	Existing customer	3 years	6/10	57.5
P5	Founder (5 people)	Trial user	New	7/10	77.5
P6	Freelance accountant	Trial user	New	8/10	70
P7	Operations lead	Trial user	New	7/10	62.5
P8	Finance assistant	Trial user	New	8/10	85

Average SUS 71.3; existing customers 68.8, trial users 73.8.

Findings 16 issues

ID	ISSUE	TASKS	AFFECTED	SEVERITY	RECOMMENDATION	EFFORT
`UX-01`	Recurring options hidden behind 'More'	T2	6/8	High	Add 'Repeat this invoice' next to Send	S
`UX-02`	Credit note only reachable from the Credit notes page	T4	6/8	High	'Credit this invoice' on the invoice page	M

ID	ISSUE	TASKS	AFFECTED	SEVERITY	RECOMMENDATION	EFFORT
UX–03	'Mark as paid' assumes the full amount	T3	3/8	High	Ask for the amount, show remaining balance	S
UX–04	Error messages don't name the field or the fix	T1, T3, T9	5/8	High	Field-level errors, focus first error	M
UX–05	Filter label 'Period' is ambiguous	T5	4/8	Medium	'Issue date' and 'Due date' filters, presets	S
UX–06	Reminders: global setting and per-customer toggle conflict	T7	3/8	Medium	One place, show effective state per customer	M
UX–07	Role names without descriptions	T9	4/8	Medium	Short description and permission list per role	S
UX–08	SVG logo upload fails without a message	T10	2/8	Medium	Accept SVG or explain allowed formats	S
UX–09	No confirmation after sending (2–3 s delay)	T1	5/8	Medium	Immediate toast, disable button while sending	S
UX–10	Export button only visible inside the report	T8	2/8	Low	Export also from the reports list	S
UX–11	Draft invoices can't be deleted with undo	T1	2/8	Low	Undo toast for 10 s	S
UX–12	'Document' and 'invoice' used for the same thing	T1, T4	3/8	Low	Use 'invoice' everywhere	S
UX–13	Portal 'Pay now' below the fold on small phones	T6	2/8	Low	Sticky payment bar on mobile	S
UX–14	Dialog buttons ordered differently than page buttons	T4, T9	3/8	Low	Primary action always on the right	S
UX–15	Customer search ignores VAT number	T1	2/8	Low	Search by VAT number too	S

ID	ISSUE	TASKS	AFFECTED	SEVERITY	RECOMMENDATION	EFFORT
UX–16	Help article for recurring invoices not linked	T2	3/8	Low	Link help from the schedule screen	S

Top findings in detail

High UX–01 Recurring options are hidden behind 'More'

Observed 6 of 8 opened the Schedule menu and closed it; 3 gave up and asked how to repeat an invoice.

Recommendation **Repeat this invoice** next to **Send**, with the next 3 dates as a preview.

High UX–02 Credit notes start from the wrong place

Observed 6 of 8 opened the invoice first; the only entry point is Credit notes → New, which then asks for an invoice number.

Recommendation **Credit this invoice** on the invoice page, with lines pre-filled.

High UX–03 'Mark as paid' assumes the full amount

Observed 3 participants marked a €500 partial payment as fully paid.

Recommendation Ask for the amount (default: open balance), show the remaining balance before confirming.

High UX–04 Error messages don't say what to fix

Observed 'Validation failed' after saving; 5 participants scrolled the whole form to find the red field.

Recommendation Name the field and the fix, move focus to the first error. Also fixes accessibility issue A11Y-05.

Heuristic review 20 issues

HEURISTIC	SCREEN	ISSUE	SEVERITY
Visibility of system status	Invoice editor	No feedback for 2–3 s after Send	Medium
Visibility of system status	Bank import	No progress indicator for large CSV files	Low

HEURISTIC	SCREEN	ISSUE	SEVERITY
Match with the real world	Credit notes	Finance users call them 'corrections'	Low
Match with the real world	Navigation	'Documents' menu contains only invoices	Low
User control and freedom	Invoice list	Deleting a draft has no undo	Medium
User control and freedom	Recurring	No way to skip one occurrence	Medium
Consistency and standards	Dialogs	Primary button left in dialogs, right on pages	Low
Consistency and standards	Dates	DD/MM in lists, MM/DD in the date picker	Medium
Error prevention	Payments	Full amount pre-filled for partial payments	High
Error prevention	Customers	Archive and delete buttons side by side	Medium
Recognition rather than recall	Reports	Filters reset when switching tabs	Low
Recognition rather than recall	Invoice editor	Product codes required, names not searchable	Medium
Flexibility and efficiency	Invoice list	No keyboard shortcuts for frequent actions	Low
Flexibility and efficiency	Bulk actions	Bulk send limited to one page of results	Low
Aesthetic and minimalist design	Dashboard	6 charts, 2 used by participants	Low
Help users with errors	Forms	'Validation failed' without details	High
Help users with errors	Login	'Something went wrong' on expired invite	Medium
Help and documentation	Recurring	Help article exists but isn't linked	Low
Help and documentation	Roles	No explanation of what each role can do	Medium
Accessibility (quick check)	Forms	Errors shown by colour only	High

What participants said

WHO	TASK	QUOTE
P4	T2	“I'd expect a ‘repeat monthly’ right next to Send. Is this even possible here?”

WHO	TASK	QUOTE
P2	T4	“I'd open the invoice and say ‘correct this line’. Why is it somewhere else?”
P7	T3	“It says paid. But they only paid half… did I just break the balance?”
P5	T1	“Validation failed — which field? I'll just try again.”
P6	T5	“Period of what? Issue date or due date?”
P1	T7	“I turned reminders on in settings, but this customer still says off.”
P8	T6	“That was easy. Faster than my bank app.”
P3	T9	“Accountant or Viewer? I don't know what either can do.”
P5	T10	“I uploaded the logo… nothing happened?”
P2	T8	“Found it. The Excel button is a bit hidden but fine.”

Recommendations

PRIORITY	CHANGE	FIXES	IMPACT	EFFORT
1	Actions on the invoice page: repeat, credit, record payment with amount	UX-01, 02, 03	High	M
2	Field-level error messages with focus management	UX-04	High	M
3	Immediate feedback on Send; prevent double submit	UX-09	Medium	S
4	Role descriptions in the invite dialog	UX-07	Medium	S
5	Clear date filters with presets	UX-05	Medium	S
6	One place for reminder settings	UX-06	Medium	M
7	Small fixes: SVG logo, export button, wording, button order	UX-08, 10, 12, 14	Low	S

After the changes: re-test T2–T4 with 5 new participants; target ≥ 6/8 success and ease ≥ 5. The 10 tasks become UAT cases checked every release.

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