w3experts

SaaS UX audit checklist

VERSION 1.1 · NOVEMBER 2026 · 64 TESTABLE CHECKS

Each check is a statement you can mark pass or fail, with the way to test it and the WCAG 2.2 success criterion or usability heuristic behind it. Use it on a live product, a staging build or a clickable prototype.

Sections

1. Sign-up and onboarding (8)
2. Activation and first value (6)
3. Navigation and information architecture (8)
4. Forms and validation (9)
5. Empty, loading and error states (7)
6. Settings, roles and billing (8)
7. Accessibility spot checks (WCAG 2.2 AA) (10)
8. Mobile (8)

Product and build	
Roles and accounts used	
Devices, browsers and widths	
Reviewer and date	

Free to use and adapt. Record failures in the findings ledger of the UX audit report template: w3experts.com/resources/ux-audit-report-template/

[00] HOW TO USE THIS CHECKLIST

Before you start

1. **Pick the tasks.** Choose three to six tasks that matter to the business, such as sign-up, first project and inviting a teammate. Skip sections that do not apply and mark them N/A.
2. **Prepare accounts.** One test account per role, plus a brand-new account for the sign-up and empty-state checks.
3. **Test at two widths.** 390 px for phones and 1440 px for desktop, plus one pass on a real phone.
4. **Mark each check.** Pass, Fail or N/A. A check passes only when the test was actually run. "Probably fine" is not a pass.
5. **Record every failure as a finding.** Write what happened, the evidence (screenshot, recording or script output, with date, browser and width) and a severity.
6. **Prioritize.** Use the severity, effort and confidence rule in the report template to turn failures into a backlog.

What the references mean. "WCAG" numbers are success criteria in the Web Content Accessibility Guidelines 2.2; every one cited here is level A or AA. "Heuristic" numbers refer to Jakob Nielsen's ten usability heuristics: 1 visibility of system status, 2 match with the real world, 3 user control and freedom, 4 consistency and standards, 5 error prevention, 6 recognition rather than recall, 7 flexibility and efficiency, 8 aesthetic and minimalist design, 9 help users recognize, diagnose and recover from errors, 10 help and documentation.

Limits. This checklist finds likely problems. It does not replace usability testing with real users, and passing the accessibility section is not a WCAG conformance claim. A conformance claim needs every page and state reviewed.

Severity used for failures

Critical	Blocks the task or loses data, with no workaround a typical user would find.
Major	The task can be finished, but many users will fail or need help. Includes WCAG 2.2 AA failures on the flow.
Minor	Slows people down or weakens trust, but the task succeeds.
Cosmetic	Polish with no measurable effect on the task.

[A] SECTION A · 8 CHECKS

Sign-up and onboarding

Test with a fresh email address and a clean browser profile. Record the number of screens from the landing page to a usable account.

- [ ] **A1. Sign-up asks only for what the first session needs.** Pass · Fail · N/A
  How to test: List every sign-up field. Mark each one the product uses before first value. Any unused field is a finding.
  Heuristic 8

- [ ] **A2. A password manager can fill and paste credentials.** Pass · Fail · N/A
  How to test: Paste a generated 30-character password and let the browser autofill the email. Nothing blocks paste.
  WCAG 3.3.8

- [ ] **A3. Password rules are visible before the first attempt.** Pass · Fail · N/A
  How to test: Open the form and read the hint before typing anything.
  WCAG 3.3.2

- [ ] **A4. Email verification does not block a first look at the product.** Pass · Fail · N/A
  How to test: Sign up, skip the email, try the first task. Note what is locked and whether the lock is explained.
  Heuristic 1

- [ ] **A5. Single sign-on and email sign-up reach the same account for the same address.** Pass · Fail · N/A
  How to test: Create an account by email, then sign in with Google or Microsoft using that address. Check for a duplicate workspace.
  Data integrity

- [ ] **A6. Onboarding questions say why they are asked and can be skipped.** Pass · Fail · N/A
  How to test: Try to skip each question. Look for a one-line reason next to each one.
  Heuristic 3

- [ ] **A7. Leaving onboarding and returning resumes the same step.** Pass · Fail · N/A
  How to test: Close the tab on step 2, sign in again, and note where you land.
  WCAG 3.3.7

- [ ] **A8. The teammate invite step can be skipped and done later.** Pass · Fail · N/A
  How to test: Skip it, then find the invite action from the main navigation in two steps or fewer.
  Heuristic 7

Notes

[B] SECTION B · 6 CHECKS

Activation and first value

Define the activation event first (for example, the first project created or the first invoice sent). Every check below refers to it.

- [ ] **B1. The activation event is reachable in a recorded number of steps.** Pass · Fail · N/A
  How to test: Count screens and clicks from sign-up to the activation event. Record the count so the next release can be compared.
  `Baseline`

- [ ] **B2. An empty account offers sample data or a template.** Pass · Fail · N/A
  How to test: Open each main view in a new account. Each one offers a way to start that is not a blank form.
  `Heuristic 10`

- [ ] **B3. The first key action confirms what happened and suggests the next step.** Pass · Fail · N/A
  How to test: Complete the action and read the confirmation. It names the result and one next action.
  `Heuristic 1`

- [ ] **B4. Trial length and what happens at the end are visible in the product.** Pass · Fail · N/A
  How to test: Find the trial end date and the downgrade behavior within two clicks of the dashboard.
  `Heuristic 1`

- [ ] **B5. Tours and checklists can be dismissed and reopened.** Pass · Fail · N/A
  How to test: Dismiss the tour, reload, and find a way to reopen it from help or settings.
  `Heuristic 3`

- [ ] **B6. The activation event is tracked once per account.** Pass · Fail · N/A
  How to test: Trigger it in a test account and check the analytics debugger. One event, with the right account ID.
  `Measurement`

Notes

[C] SECTION C · 8 CHECKS

Navigation and information architecture

Compare navigation labels with the words customers use in support tickets and sales calls.

- [ ] **C1. Navigation labels use the customer's words, not internal feature names.** Pass · Fail · N/A
  How to test: Pull 20 support tickets. List the nouns customers use and compare them with the menu labels.
  Heuristic 2

- [ ] **C2. Each view has a unique, descriptive page title.** Pass · Fail · N/A
  How to test: Open five views and read the browser tab titles. No two are the same.
  WCAG 2.4.2

- [ ] **C3. The current location is always visible.** Pass · Fail · N/A
  How to test: On each main view, check for an active menu item, a heading or a breadcrumb that names the place.
  Heuristic 1

- [ ] **C4. Every main object is reachable in three steps or fewer.** Pass · Fail · N/A
  How to test: From the dashboard, reach a project, an invoice and a user record. Count the steps for each.
  Heuristic 7

- [ ] **C5. Search handles partial words and typos.** Pass · Fail · N/A
  How to test: Search for three known records with a partial word and one typo each. Record the hits.
  Heuristic 9

- [ ] **C6. Copied links reopen the same view after sign-in.** Pass · Fail · N/A
  How to test: Copy a deep link, open it in a private window, sign in, and check you land on that view.
  Heuristic 3

- [ ] **C7. Navigation and help appear in the same place on every view.** Pass · Fail · N/A
  How to test: Compare the menu order and the help link position across five views.
  WCAG 3.2.3, 3.2.6

- [ ] **C8. The browser back button returns to the previous view with filters kept.** Pass · Fail · N/A
  How to test: Apply a filter, open a record, press back. The filter is still applied.
  Heuristic 3

Notes

[D] SECTION D · 9 CHECKS

Forms and validation

Run every form at 390 px and 1440 px. Submit it empty, then with one wrong value per field.

- [ ] **D1. Every field has a visible label that stays after typing.** Pass · Fail · N/A
  How to test: Type in each field. The label is still visible and is not only hint text inside the field.
  WCAG 3.3.2, 1.3.1

- [ ] **D2. Format rules are stated before submit.** Pass · Fail · N/A
  How to test: Read the form before typing. Length, characters and date formats are shown next to the field.
  WCAG 3.3.2

- [ ] **D3. Errors appear next to the field and say how to fix it.** Pass · Fail · N/A
  How to test: Submit invalid data. Each message names the field and the fix, in plain words.
  WCAG 3.3.1, 3.3.3

- [ ] **D4. All errors show at once, with a summary that links to each field.** Pass · Fail · N/A
  How to test: Submit with three invalid fields. Count the messages shown on the first attempt.
  Heuristic 9

- [ ] **D5. After a failed submit, the first error is focused and fully visible.** Pass · Fail · N/A
  How to test: Submit invalid at both widths. Measure the focused field against the sticky header and the window edges.
  WCAG 2.4.11

- [ ] **D6. Errors are tied to fields for assistive technology.** Pass · Fail · N/A
  How to test: Inspect the invalid field: aria-invalid is true and aria-describedby points to the message.
  WCAG 4.1.2

- [ ] **D7. Entered data survives errors, back and reload.** Pass · Fail · N/A
  How to test: Fill half the form, trigger an error, go back, reload. Count the fields you must re-enter.
  WCAG 3.3.7

- [ ] **D8. Financial and destructive actions can be reviewed or undone.** Pass · Fail · N/A
  How to test: Before payment or deletion, check for a review step, a confirmation or an undo.
  WCAG 3.3.4

- [ ] **D9. Inputs use the right type and autocomplete values.** Pass · Fail · N/A
  How to test: Check email, tel and one-time-code fields in dev tools. Autofill works on a phone.
  WCAG 1.3.5

Notes

[E] SECTION E · 7 CHECKS

Empty, loading and error states

Use browser dev tools to throttle the network, go offline and block requests. Note what the user sees in each case.

- [ ] **E1. Every list and dashboard has a designed empty state with one primary action.** Pass · Fail · N/A
  How to test: Open each view in a new account. Record the message and the action offered.
  Heuristic 10
- [ ] **E2. Waits over one second show progress, and the layout does not jump.** Pass · Fail · N/A
  How to test: Throttle to Slow 4G. Watch for a spinner or skeleton and for content shifting when data arrives.
  Heuristic 1, CLS
- [ ] **E3. Status messages are announced without moving focus.** Pass · Fail · N/A
  How to test: Save something. The confirmation sits in a role=status or aria-live region.
  WCAG 4.1.3
- [ ] **E4. Server errors say what happened and what to do next.** Pass · Fail · N/A
  How to test: Block an API request in dev tools. The message is in plain words, not only a code.
  Heuristic 9
- [ ] **E5. Offline or timeout keeps the user's input and offers a retry.** Pass · Fail · N/A
  How to test: Go offline, submit a form, come back online. The input is still there and retry works.
  Heuristic 5
- [ ] **E6. Not-found and permission-denied views offer a way back.** Pass · Fail · N/A
  How to test: Open a deleted record and a record from another workspace. Each view has a link onward.
  Heuristic 9
- [ ] **E7. Session expiry warns before data loss.** Pass · Fail · N/A
  How to test: Shorten the session in a test environment. A warning appears and the user can extend it.
  WCAG 2.2.1

Notes

[F] SECTION F · 8 CHECKS

Settings, roles and billing

Use an owner account and a member account. Billing checks need a test card or the payment provider's test mode.

- [ ] **F1. Plan, price, billing period and next charge date are on one screen.** Pass · Fail · N/A
  How to test: Open billing settings and find all four without scrolling past the first screen.
  Heuristic 1

- [ ] **F2. Upgrades show the prorated amount before confirming.** Pass · Fail · N/A
  How to test: Start an upgrade in test mode. The amount due today is shown before the final button.
  WCAG 3.3.4

- [ ] **F3. Cancelling takes no more steps than signing up.** Pass · Fail · N/A
  How to test: Count the steps to cancel and compare with the sign-up count from section A.
  Heuristic 3

- [ ] **F4. Invoices download with company details and tax IDs.** Pass · Fail · N/A
  How to test: Download one invoice and check the legal name, address and tax fields.
  Records

- [ ] **F5. Role permissions are explained where roles are assigned.** Pass · Fail · N/A
  How to test: Open the invite or role dialog. Each role lists what it can and cannot do.
  Heuristic 6

- [ ] **F6. Changing email or password asks for the current password and sends a notice.** Pass · Fail · N/A
  How to test: Change the email in a test account. Check for re-authentication and a message to the old address.
  Security

- [ ] **F7. Users can export their data.** Pass · Fail · N/A
  How to test: Find the export action and download a file. Note the format and what is missing.
  Heuristic 3

- [ ] **F8. Account deletion explains what is deleted and when.** Pass · Fail · N/A
  How to test: Open the deletion flow and read the explanation before the final step.
  Heuristic 5

Notes

[G] SECTION G · 10 CHECKS

Accessibility spot checks (WCAG 2.2 AA)

These checks cover the core task, not full conformance. Record the scanner name and version, the browser and the date.

- [ ] **G1. The core task works with the keyboard alone.** Pass · Fail · N/A
  How to test: Complete it with Tab, Shift+Tab, Enter, Space and arrow keys. No mouse.
  WCAG 2.1.1

- [ ] **G2. Modals, menus and date pickers do not trap focus.** Pass · Fail · N/A
  How to test: Open each one and leave it with Escape or Tab. Focus returns to the trigger.
  WCAG 2.1.2

- [ ] **G3. Focus is visible and never hidden by sticky bars, banners or chat buttons.** Pass · Fail · N/A
  How to test: Tab through each view at 390 px and 1440 px. Every focused element is fully visible.
  WCAG 2.4.7, 2.4.11

- [ ] **G4. Text and controls meet contrast minimums.** Pass · Fail · N/A
  How to test: Text at least 4.5:1, large text 3:1, borders and icons 3:1. Check hover, disabled and hint text too.
  WCAG 1.4.3, 1.4.11

- [ ] **G5. Targets are at least 24 by 24 CSS pixels, or spaced apart.** Pass · Fail · N/A
  How to test: Measure icon buttons, close buttons and inline actions in dev tools.
  WCAG 2.5.8

- [ ] **G6. Dragging has a single-pointer alternative.** Pass · Fail · N/A
  How to test: For every drag action (reorder, upload, slider), find a click or tap alternative.
  WCAG 2.5.7

- [ ] **G7. Content reflows at 320 CSS pixels without sideways scrolling.** Pass · Fail · N/A
  How to test: Set the window to 320 px or zoom to 400% at 1280 px. Data tables may scroll inside their container.
  WCAG 1.4.10

- [ ] **G8. Icon-only buttons and meaningful images have text alternatives.** Pass · Fail · N/A
  How to test: Inspect each icon button for an accessible name in the dev tools accessibility pane.
  WCAG 1.1.1, 4.1.2

- [ ] **G9. Headings and landmarks describe the structure.** Pass · Fail · N/A
  How to test: List headings with a browser extension or dev tools. Levels do not skip, and main and nav landmarks exist.
  WCAG 1.3.1

- [ ] **G10. An automated scan shows no serious violations on each view.** Pass · Fail · N/A
  How to test: Run axe-core or a similar scanner on every view in scope. A clean scan is a floor, not conformance.
  Tool output

Notes

[H] SECTION H · 8 CHECKS

Mobile

Use a real phone for at least one pass. Emulation misses keyboards, safe areas and slow processors.

- [ ] **H1. The core task completes at 390 px and at 320 px.** Pass · Fail · N/A
  How to test: Run the whole task at both widths. Record any step that needs zooming or sideways scrolling.
  WCAG 1.4.10

- [ ] **H2. Sticky bars and banners never cover inputs, focused fields or the submit button.** Pass · Fail · N/A
  How to test: With the on-screen keyboard open, step through each field and check what stays visible.
  WCAG 2.4.11

- [ ] **H3. Primary actions are easy to tap.** Pass · Fail · N/A
  How to test: Primary buttons are 44 px tall or more. Small links have space around them.
  WCAG 2.5.8

- [ ] **H4. The right keyboard opens for each field.** Pass · Fail · N/A
  How to test: Tap email, phone, number and code fields on a phone. Check the keyboard layout.
  WCAG 1.3.5

- [ ] **H5. Orientation is not locked.** Pass · Fail · N/A
  How to test: Rotate the phone on each view. Content adapts and nothing is lost.
  WCAG 1.3.4

- [ ] **H6. Tables stay readable on a small screen.** Pass · Fail · N/A
  How to test: Open the widest table. It scrolls inside a container with a visible cue, or stacks.
  WCAG 1.4.10

- [ ] **H7. Text can be zoomed to 200 percent without loss.** Pass · Fail · N/A
  How to test: Increase the text size in browser settings. No text is cut off or overlaps.
  WCAG 1.4.4

- [ ] **H8. Interactions respond quickly on a mid-range phone.** Pass · Fail · N/A
  How to test: Check INP under 200 ms and LCP under 2.5 s in field data, or in a throttled lab run if there is no traffic.
  Core Web Vitals

Notes

[99] RESULTS

Summary of this review

Section	Pass	Fail	N/A	Critical or Major failures
A. Sign-up and onboarding				
B. Activation and first value				
C. Navigation and information architecture				
D. Forms and validation				
E. Empty, loading and error states				
F. Settings, roles and billing				
G. Accessibility spot checks (WCAG 2.2 AA)				
H. Mobile				

Not tested, and why

Sign-off

Role	Name	Date	Signature
Reviewer			
Product owner			