[Company name]

*How to use this document: delete this paragraph before saving, sharing, or circulating it. Every part shown in blue is yours to replace: type your own details over each blue **[field]** until no blue remains. Add or remove table rows to fit your needs. Then select all (Ctrl+A) and set the font colour to the same dark colour throughout. What is left is your finished document.*

Visual Step-by-Step Work Instruction

*Use this template to document any click-by-click computer task so a new hire or covering colleague can follow it without asking questions. Replace every placeholder in **[square brackets]** with your own content, then delete the grey instruction text before you share it.*

Task / procedure	**[e.g. How to raise a purchase order in the finance system]**
Software / system	**[e.g. Xero, Google Workspace, Slack]**
Prepared by	**[Name and role]**
Procedure owner	**[Name and role]**
Version	1.0
Date created	**[DD Month YYYY]**
Review date	**[DD Month YYYY]**

Before you start

✓	Prerequisite
	You will need: **[list logins, access, or files the reader must have before step 1]**.
	Do not start until: **[any approval or precondition, e.g. manager approval received]**.

Step-by-step instructions

Paste one cropped screenshot per step. Crop tightly to the button or field being used, and add a circle or arrow if the target is not obvious.

Step	Screenshot	Action + expected result
1	**[Paste screenshot here - crop to the exact button or field]**	**[Write one action only, starting with a verb: e.g. Click ‘Add new user’.]** Expected result: **[What the reader should see next, e.g. A ‘New user’ form opens.]**
2	**[Paste screenshot here - crop to the exact button or field]**	**[Write one action only, starting with a verb: e.g. Click ‘Add new user’.]** Expected result: **[What the reader should see next, e.g. A ‘New user’ form opens.]**
3	**[Paste screenshot here - crop to the exact button or field]**	**[Write one action only, starting with a verb: e.g. Click ‘Add new user’.]** Expected result: **[What the reader should see next, e.g. A ‘New user’ form opens.]**
4	**[Paste screenshot here - crop to the exact button or field]**	**[Write one action only, starting with a verb: e.g. Click ‘Add new user’.]** Expected result: **[What the reader should see next, e.g. A ‘New user’ form opens.]**

[Company name]

Step	Screenshot	Action + expected result
5	**[Paste screenshot here - crop to the exact button or field]**	**[Write one action only, starting with a verb: e.g. Click ‘Add new user’.]** Expected result: **[What the reader should see next, e.g. A ‘New user’ form opens.]**
6	**[Paste screenshot here - crop to the exact button or field]**	**[Write one action only, starting with a verb: e.g. Click ‘Add new user’.]** Expected result: **[What the reader should see next, e.g. A ‘New user’ form opens.]**
7	**[Paste screenshot here - crop to the exact button or field]**	**[Write one action only, starting with a verb: e.g. Click ‘Add new user’.]** Expected result: **[What the reader should see next, e.g. A ‘New user’ form opens.]**
8	**[Paste screenshot here - crop to the exact button or field]**	**[Write one action only, starting with a verb: e.g. Click ‘Add new user’.]** Expected result: **[What the reader should see next, e.g. A ‘New user’ form opens.]**
9	**[Paste screenshot here - crop to the exact button or field]**	**[Write one action only, starting with a verb: e.g. Click ‘Add new user’.]** Expected result: **[What the reader should see next, e.g. A ‘New user’ form opens.]**
10	**[Paste screenshot here - crop to the exact button or field]**	**[Write one action only, starting with a verb: e.g. Click ‘Add new user’.]** Expected result: **[What the reader should see next, e.g. A ‘New user’ form opens.]**

Add or remove step rows to fit your task.

Verification checklist

✓	Verification check
	The task is complete and visible where it should be (e.g. the new user can sign in).
	Any confirmation email, reference number, or receipt is saved in **[location]**.
	The manager / requester has been told the task is done.

Checked by: **[Name]** - Date: **[DD Month YYYY]**

If something goes wrong

[Write the one most common error, what causes it, and who to contact. Example: If you see ‘You do not have permission’, stop and contact the system administrator - do not keep retrying.]

Note: Screenshots in this document show third-party software for internal training only. Follow the software provider’s terms of use, and do not share login credentials in screenshots.