Ashford Business Services Ltd

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	How to raise a purchase order in the finance system
Software / system	**Xero, google workspace, slack**
Prepared by	**James Patel, Office Manager**
Procedure owner	**Emma Clarke, Finance Manager**
Version	1.0
Date created	**9 November 2026**
Review date	**9 November 2026**

Before you start

✓	Prerequisite
	You will need: a finance system login and the supplier's quote.
	Do not start until: your manager has approved the purchase.

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	Screenshot: the finance system home screen, Purchase Orders menu highlighted.	Click 'Purchase Orders' in the left-hand menu. Expected result: The purchase order list opens.
2	Screenshot: the 'New purchase order' button at the top right.	Click 'New purchase order'. Expected result: A blank purchase order form opens.

Ashford Business Services Ltd

Step	Screenshot	Action + expected result
3	Screenshot: the supplier search box with 'Riverside Supplies Ltd' typed in.	Type 'Riverside Supplies Ltd' in the supplier box and select it from the list. Expected result: The supplier's address and payment terms fill in.
4	Screenshot: the first order line, item 'A4 paper, box of 5 reams'.	Add the first order line: 'A4 paper, box of 5 reams', quantity 10, price £45.00. Expected result: The line total shows £450.00.
5	Screenshot: the order total box showing £450.00 plus VAT.	Check the order total of £450.00 plus VAT. Expected result: The total matches the quote.
6	Screenshot: the delivery address dropdown.	Select the delivery address 'Main office, 12 High Street'. Expected result: The delivery address appears on the order.
7	Screenshot: the 'Submit for approval' button.	Click 'Submit for approval'. Expected result: The order status changes to 'Awaiting approval'.
8	Screenshot: the approval notification email.	Wait for the approval email from David Okafor. Expected result: The order status changes to 'Approved'.
9	Screenshot: the 'Send to supplier' button.	Click 'Send to supplier'. Expected result: The order is emailed to the supplier and the status changes to 'Sent'.
10	Screenshot: the order confirmation showing reference PO-2026-031.	Note the order reference PO-2026-031 for your records. Expected result: The purchase order appears in the order list as 'Sent'.

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 **Boardroom, 12 Church Street, Birmingham**.
	The manager / requester has been told the task is done.

Checked by: **Sarah Mitchell** - Date: **9 November 2026**

Ashford Business Services Ltd

If something goes wrong

If you see 'You do not have permission', stop and contact the system administrator.

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.