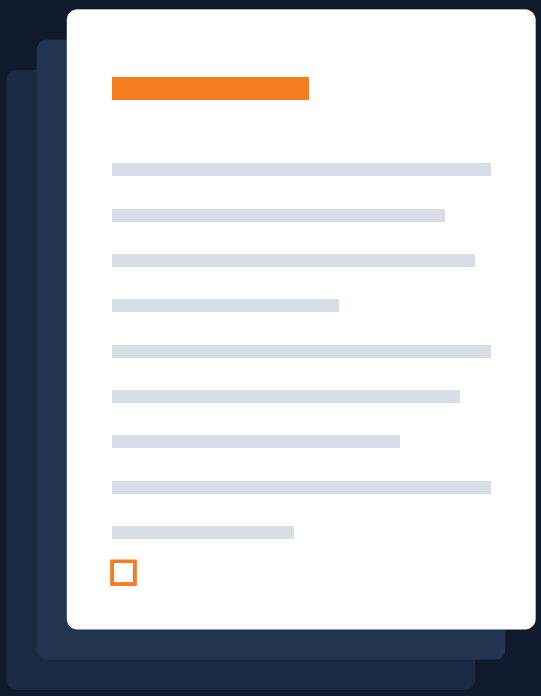
Documentation
Services Lab



FREE TEMPLATE

WORK INSTRUCTIONS

Software & System Task Work Instruction

Screen-by-screen instructions for a task in a software system, with screenshots and expected results.

LEVEL OF DETAIL

Moderate

BEST SUITED FOR

ERP, CRM, WMS and admin tasks done in an application

About this template

System task instructions show users exactly where to click and what to enter. Each step names the screen, the field and the value, with a screenshot and the result the user should see. Keep one task per instruction and update it whenever the screens change.

Detail	
Level of detail	Moderate
Best suited for	ERP, CRM, WMS and admin tasks done in an application

How to use it

- Replace every *[grey bracketed placeholder]* with your own details.
- Delete the orange **Guidance** boxes and green **Example** boxes before you publish or circulate it.
- Add or remove table rows as needed; keep the section order so readers can find things quickly.

Document Control

WI title		**WI number**	
Revision		**Parent SOP**	
Area / workstation		**Owner**	
Approved by		**Effective date**	
System / version			

Version	Date	Author	Summary of changes
[1.0]	*[DD/MM/YYYY]*	*[Name]*	*[Initial release]*

01 Task

Task	*[e.g. Create a purchase order in the ERP]*
System and module	
User role / permission	
Inputs needed	*[Data or documents to have ready]*

02 Navigation Path

GUIDANCE *Show the path to the starting screen.*

Menu path	*[Purchasing > Orders > New]*
Shortcut / transaction code	

03 Steps

GUIDANCE *Name the screen, the field and the exact value or option.*

#	Screen	Action (click / enter / select)	Expected result
1	*[Screen name]*	*[Click 'New order']*	*[Blank order form opens]*

04 Screenshots

Screenshot	Annotation
[Screenshot with highlighted field]	*[Step no. and what to notice]*
[Screenshot]	

05 Field Reference

> ***GUIDANCE*** *Explain fields users often get wrong.*

Field	What to enter	Validation / format

06 Errors & Fixes

Error message	Cause	Fix

07 Approval

GUIDANCE *Record who reviewed and approved this document.*

Role	Name	Signature	Date
Prepared by			
Reviewed by			
Approved by			

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