

Work instruction

[Title: the task as verb + object, e.g. Void an unpaid invoice in the ERP]

Replace every text in [brackets] and delete these grey hints. A work instruction describes one task at one workstation precisely enough that a trained person can do it without asking.

Document ID	[e.g. WI-001]	Version	[1.0]
Effective date	[date]	Next review	[date, within 12 months]
Area / workstation	[department, workstation or system]	Owner	[name, role: keeps this instruction correct]
Parent SOP	[ID and title of the SOP or procedure this task belongs to]		

1. Purpose and scope

Purpose	[One sentence: what the task produces and what goes wrong without it.]
Use when	[The trigger: the event, order or ticket that starts the task]
Not for	[The nearest case that works differently, and where it is written]
Who does it	[Role, e.g. accounts payable clerk, after training]

2. Safety and data protection

!	[What must be in place before step 1, e.g. protective equipment, four-eyes approval, no customer data in screenshots]
!	[What cannot be undone, and at which step]

3. Prerequisites and tools

- [Access, role or permission, e.g. the Finance role in the ERP]
- [Documents or data needed before step 1, e.g. the invoice number from the ticket]
- [Tool, device or material]

4. Steps

No.	Action	Screenshot / image	Result / check
1	[Verb + exact label in bold, e.g. In the menu, click Invoices .]	[Screenshot, clicked element marked]	[What you see next]
2	[]	[]	[]
3	[]	[]	[]
4	[]	[]	[]
5	[]	[]	[]
6	[]	[]	[]

5. Expected result

[How you know the task is done correctly: the message, status or document that shows it. What to record afterwards.]

6. Problems and deviations

If this happens	Then
[Error message or symptom]	[Stop, what to do or whom to ask]
[]	[]

7. Related documents

[Forms, checklists, other work instructions, with IDs]

8. Revision history

Version	Date	Change	By
[1.0]	[date]	[First version]	[name]
[]	[]	[]	[]

9. Approval

	Name, role	Date	Signature
Written	[]	[]	
Reviewed	[]	[]	
Approved	[]	[]	