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: _____ **Software / system:** _____

Prepared by: _____ **Procedure owner:** _____

Version: 1.0

Date created: _____ **Review date:** _____

Before you start: 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'. as agreed at the meeting.** 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'. as agreed at the meeting.** 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'. as agreed at the meeting.** Expected result: **What the reader should see next, e.g. A 'New user' form opens.**
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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'. as agreed at the meeting.** 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'. as agreed at the meeting.** 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'. as agreed at the meeting.** 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: 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

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.