About: Procedure guides

Overview	A procedure guide is a document that provides step-by-step instructions on how to perform a specific task or process. It is designed to ensure consistency, accuracy, and efficiency by outlining the necessary actions, tools, and best practices required to complete the task correctly.
Elements	Procedure guides typically use a range of elements to convey information in a clear, concise manner. These can include: • High-level process map • Roles and responsibilities matrix • Procedure maps
High-level process map	A procedure guide typically contains multiple procedures for completing tasks associated with a specific process, e.g., opening a new account, managing customer invoices. A high-level process map is provided to show the relationship between each of the procedures and the context in which they are performed.
Roles and responsibilities matrix	A roles and responsibilities matrix is also provided which summarises the roles responsible for performing all procedures in a specific process so users can understand the upstream and downstream relationships between their work and that of others.
Procedure maps	A procedure map sets out preliminary information for a procedure as well as detailed, step-by-step instructions for performing it. A procedure map typically includes the following information blocks: • Overview • Description • Responsibility • Procedure (Step / Action table) • Reference-based training instructions • Related procedures The Step / Action table includes end-user instructions, screen shots, and decision points (expressed using an If / Then table).

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About: Procedure guides (continued)

Sample: Procedure map

View an existing customer activity (note)

Overview

This procedure sets out the steps to view and existing customer activity (note).

Description

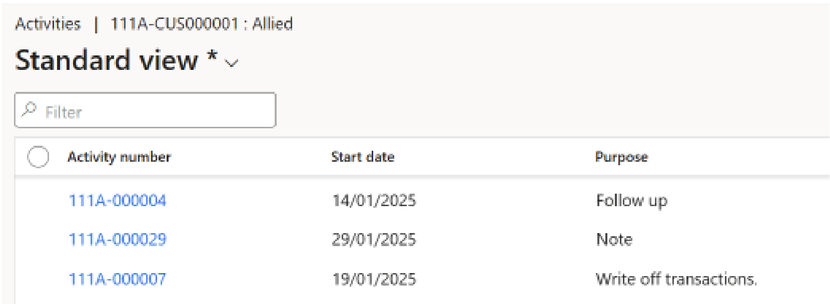
Customer activities (notes) are used to record details of interactions between a team member and a customer. The Collections Officer would typically view an existing activity (note) prior to contacting a customer.

Responsibility

The Collections Officer is responsible for viewing an existing customer activity (note).

Procedure

Complete these steps to view an existing customer activity (note):

Step	Action
1	On the Home Dashboard Toolbar, select the required entity.
2	From the Navigation Pane, select Modules > Credit and collections > Customers > All customers. **Result:** The All customers page will open. A list of all customers in the system will be displayed.
3	Search for, then click the required Customer account number. **Result:** The Customers page for the selected customer will open.
4	On the Main Toolbar, click General > Activities > Activities > All activities. **Result:** A list of customer activities will be displayed: 
5	Click an Activity number to view details. **Result:** The activity (note) will open.

Reference-based training instructions

For training purposes, use the assigned customer when completing reference-based training for this procedure. Contact the Credit and Collections champion if assistance is required.

Contact us

We can design and develop solutions to support small-scale, standalone initiatives to large-scale programs of work for major implementations. Contact us to discuss your requirements.

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