

# Workflow Customization Instructions Manual Template

Document Version: \_\_\_\_\_ | Prepared by: \_\_\_\_\_ | Date: \_\_\_\_\_

## 1. Purpose

Describe the purpose and scope of this workflow customization manual.

## 2. Overview

Provide an overview of the workflow, its objectives, and its main components.

## 3. Prerequisites

- List required tools, permissions, or access needed.
- Mention any dependencies to be set up before customization.

## 4. Workflow Structure

Step	Description	Responsible	Input/Output
[Step 1]	Describe step 1	Role/Person	Input / Output
[Step 2]	Describe step 2	Role/Person	Input / Output

## 5. Customizable Components

1. Name the component (e.g., Statuses, Fields, Rules, Notifications)
2. Describe how the component can be customized
3. Include any restrictions or important notes

## 6. Customization Steps

1. Step-by-step instruction for making a customization
2. Include references to screenshots or examples if available
3. Save and test the customized workflow

## 7. Rollback & Recovery

Describe how to undo customizations or revert to the default workflow.

## 8. Best Practices & Tips

- Document recommendations for safe and efficient customization.

- Note common pitfalls to avoid.

## **9. Troubleshooting**

Provide guidance for resolving common issues that may arise during customization.

## **10. Appendix**

- Glossary of terms
- References or related documentation
- Contact information for support