

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