Hinto

SOP Template

A fillable standard operating procedure template, with one worked example filled in beside each blank field.

> Work through the checklist first, then fill in the template below it. Every field carries an example value taken from a worked SOP for processing a vendor invoice, so you can see the level of detail before you write your own.

Before you fill it in: seven steps

- [ ] **Define the objective.** Name the single task and the result the reader should end up with. A vague objective produces a document you cannot test.
- [ ] **Set the scope and name the people.** Say what the document covers and who it applies to, then assign a role to each part of the work.
- [ ] **Choose an SOP format.** Five shapes recur: a simple step-by-step list, hierarchical steps with substeps, a flowchart, a checklist, and a graphic or annotated visual procedure.
- [ ] **Gather the detail from the people who do the work.** The operator knows the checks that went undocumented.
- [ ] **Draft the procedure body.** One action per numbered step, phrased as a command, at the level of detail your least experienced reader needs.
- [ ] **Review it, then test it.** Run an internal review, an external review, and a test of the draft against the real task before the final version ships.

☐	**Publish one copy and train on it.**	Keep a single canonical version, link to it from elsewhere rather than duplicating it, and put a review date at least a year out.

PICKING THE FORMAT

Take the flowchart when the task branches on a decision, and the checklist when completion matters more than order. Anything else usually wants the plain numbered list, with substeps where a step needs unpacking.

1. Header block

FIELD	EXAMPLE	YOURS
Document number	SOP-014	
Title	Processing a Vendor Invoice	
Owner	Accounts Payable Lead	
Effective date	3 March 2026	
Revision number	2	
Approved by / date	Finance Manager, 28 February 2026	

2. Purpose, scope, responsibilities

FIELD	WHAT GOES IN IT	EXAMPLE
Purpose	One sentence on what the procedure is for.	Pay approved vendor invoices inside the agreed terms without paying any of them twice.
Scope	One sentence saying what and who the document applies to — and what it does not.	Supplier invoices under $5,000 that arrive in the accounts payable inbox. Payroll and employee expense claims sit outside it.
Responsibilities	The role that owns each part of the procedure.	The AP clerk performs steps 1 to 4. The AP lead performs step 5.

3. Procedure body

One action per numbered step, phrased as a command, with substeps where a step needs unpacking. Name the responsible role against every step.

STEP	RESPONSIBLE	ACTION
1	AP clerk	Log the invoice in the AP tracker with supplier name, invoice number, amount and due date. *1a. Search the tracker for that invoice number first. A match means a duplicate: reply to the supplier and stop.*
2	AP clerk	Match the invoice against the purchase order in the finance system, line item by line item. *2a. Where the total differs by more than $50, email the requesting manager and hold the invoice.*
3	AP clerk	Code the invoice to the cost centre shown on the purchase order.
4	AP clerk	Move the invoice to the "Ready to pay" queue and mark the tracker row Approved.
5	AP lead	Release the payment run each Thursday at 14:00, then file the remittance in the supplier folder.
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4. Before you publish

- [ ] Every step reads as one action, in the imperative, at the level of detail your least experienced reader needs.
- [ ] The people who do the work have read the draft and corrected it.
- [ ] Someone outside the task has run the procedure end to end without asking a question.

- [ ] The header block carries an owner, an effective date, a revision number and a named approver.
- [ ] One canonical copy is published, and everywhere else links to it rather than holding its own version.
- [ ] A review date is set no more than a year out.

KEEP IT A LIVING DOCUMENT

An SOP written once and never revisited leaves stale versions in circulation. Schedule the review, keep a revision history in the header, and edit the document the week the tool or the form it describes changes.