

# SOP Template: Step-by-Step Data Input Procedures

This SOP provides detailed **step-by-step data input procedures** for each platform and system in use. It covers the standardized methods for entering, verifying, and updating data to ensure accuracy and consistency across all digital tools. The procedure aims to streamline data entry tasks, minimize errors, and maintain data integrity, supporting efficient operations and reliable reporting.

## 1. Purpose

To provide standardized data entry protocols across all digital platforms and systems to ensure consistent, accurate, and reliable data management.

## 2. Scope

This SOP applies to all staff responsible for entering, updating, or verifying data within the organization's approved systems:

- CRM Systems
- ERP Software
- HR Platforms
- Financial Tools
- Custom Databases

## 3. Responsibilities

- All users must follow the steps defined below for each respective platform.
- Supervisors must monitor compliance and provide necessary training.
- IT/Support teams must ensure platform accessibility and address technical issues promptly.

## 4. General Data Input Procedure (Applicable to all systems)

1. Log in securely using your assigned credentials.
2. Navigate to the designated data entry module or section.
3. Verify form or template requirements before starting input.
4. Enter data accurately into all required fields.
5. Double-check entries for compliance with data format (e.g., date, number, text).
6. Attach or upload supporting documents if required.
7. Save or submit data as per system instruction.
8. Review confirmation message or newly created record for accuracy.
9. Log out or proceed as directed according to job function.

## 5. Platform-Specific Data Entry Steps

Platform/System	Step-by-Step Data Input Procedure
CRM System (e.g., Salesforce, HubSpot)	<ol style="list-style-type: none"><li>1. Log in via the secure portal.</li><li>2. Select "New Record" (Lead, Contact, or Account as applicable).</li><li>3. Fill in mandatory fields (Name, Email, Company, etc.).</li><li>4. Use dropdowns and standardized options where available.</li><li>5. Attach notes or files as required.</li><li>6. Click "Save" or "Create".</li><li>7. Review the created record for completeness and accuracy.</li></ol>
ERP System (e.g., SAP, Oracle, Microsoft Dynamics)	<ol style="list-style-type: none"><li>1. Access ERP dashboard and navigate to the target module (e.g., Inventory, Finance).</li><li>2. Select "Add New Entry" or equivalent action.</li><li>3. Input all required details following field guidelines and dropdown options.</li><li>4. Upload supporting documents if prompted.</li><li>5. Click "Submit" or "Post".</li><li>6. Check confirmation or reference number for future tracking.</li></ol>

HR Platform (e.g., BambooHR, Workday)	<ol style="list-style-type: none"> <li>1. Log in and open the "Employee Records" section.</li> <li>2. Select "Add Employee" or choose an existing employee to edit.</li> <li>3. Enter/update demographic, employment, and contact information.</li> <li>4. Attach necessary contracts or documentation.</li> <li>5. Click "Save" or "Update".</li> <li>6. Verify the record for correctness and completeness.</li> </ol>
Financial Tools (e.g., QuickBooks, Xero)	<ol style="list-style-type: none"> <li>1. Open the appropriate accounting module (Invoices, Expenses, etc.).</li> <li>2. Select "Add New" (Invoice, Expense, etc.).</li> <li>3. Enter transaction details, ensuring all amounts and dates are correct.</li> <li>4. Upload relevant receipts or proof of transaction.</li> <li>5. Save and review entry for errors before submitting to records.</li> </ol>
Custom Database (e.g., MS Access, proprietary systems)	<ol style="list-style-type: none"> <li>1. Ensure database access permissions.</li> <li>2. Launch the data entry form (manually or via shortcut).</li> <li>3. Input data into designated fields, adhering to data type restrictions.</li> <li>4. Validate information (use built-in validation tools if available).</li> <li>5. Submit or save record; monitor for error messages or confirmation.</li> </ol>

## 6. Data Verification & Quality Assurance

1. Review all entered data for completeness and correctness prior to final submission.
2. Regularly audit records for consistency with source documents.
3. Report and correct discrepancies immediately.
4. Participate in periodic data entry refresher trainings and updates.

## 7. References/Attachments

- Data Entry Policy Document
- Platform-specific User Guides
- IT Support Contact Information