

Material procurement and inventory management

Automatically monitors electrical project inventory levels, generates purchase orders for materials when stock runs low, and updates job scheduling based on material availability to prevent project delays.

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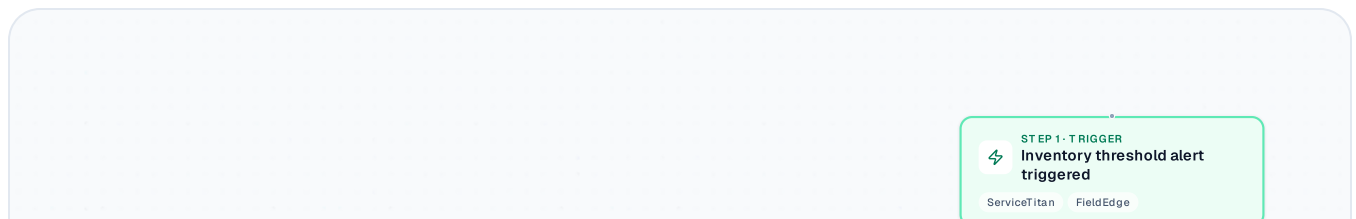
WORKFLOW TRIGGER

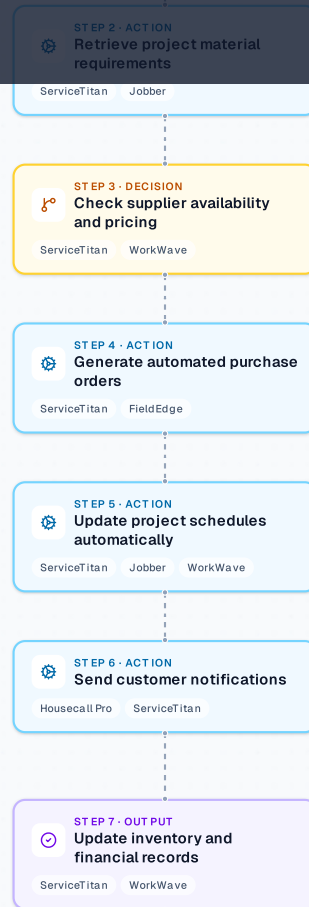


Material inventory for an active electrical project drops below predefined minimum threshold levels.

Visual Flow

Each node represents an automated step. Connections show how data and decisions move through the workflow.





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Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

⚡ TRIGGER

Inventory threshold alert triggered

System detects that electrical materials (wire, conduit, breakers, etc.) for active projects have fallen below minimum stock levels. Alert includes

2

 ACTION

Retrieve project material requirements

Pull detailed material specifications and quantities needed for upcoming scheduled electrical jobs. Cross-reference with current inventory levels to calculate exact procurement needs.

ServiceTitan

Jobber

3

 DECISION

Check supplier availability and pricing

Query preferred electrical supply vendors for material availability and current pricing. Determine if materials can be delivered within project timeline requirements.

ServiceTitan

WorkWave

4

 ACTION

Generate automated purchase orders

Create and send purchase orders to selected suppliers for required electrical materials. Include project codes, delivery dates, and special handling instructions for sensitive equipment.

ServiceTitan

FieldEdge

5

 ACTION

Update project schedules automatically

Adjust crew dispatch schedules and project timelines based on confirmed material delivery dates. Notify project managers of any scheduling changes or potential delays.

ServiceTitan

Jobber

WorkWave

6

 ACTION

Send customer notifications

Automatically inform customers of any project timeline adjustments due to material procurement. Include updated start dates and completion estimates.

Housecall Pro

ServiceTitan

7

 OUTPUT

Update inventory and financial records

Record purchase orders in accounting system, update inventory management with expected delivery dates, and generate material cost reports for project profitability tracking.

ServiceTitan

WorkWave



Outputs

- Automated purchase orders sent to suppliers

AI Business OS

- Updated project schedules with material delivery dates
- Customer notifications with revised timelines
- Real-time inventory tracking updates



Key Metrics

- Material stockout frequency
- Average procurement lead time
- Project delay reduction percentage



Tools & Integrations

- ServiceTitan
- FieldEdge
- Jobber
- WorkWave
- Housecall Pro

AI Business OS

Actionable AI implementation strategies for business leaders ready to transform their operations.

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