

# Inventory tracking and parts ordering

Automatically monitors plumbing inventory levels and creates purchase orders when parts fall below reorder thresholds, ensuring technicians always have necessary parts for jobs.

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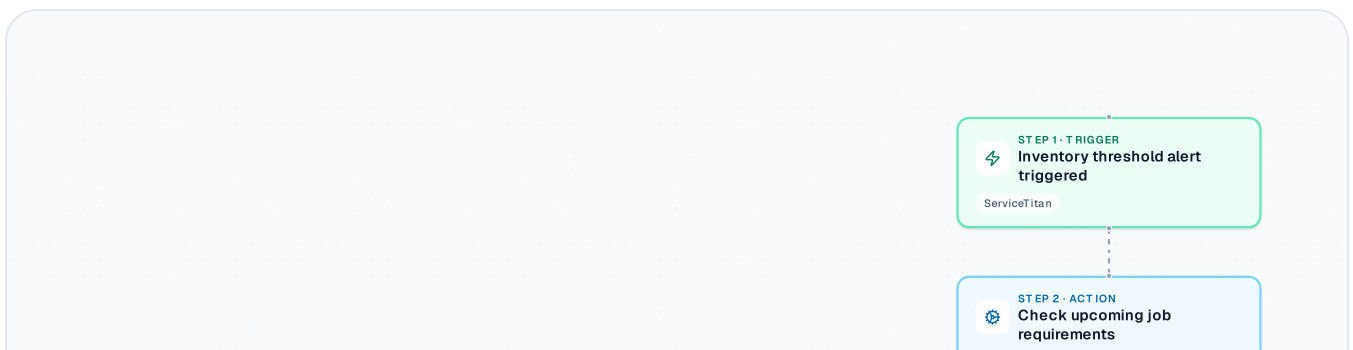


## WORKFLOW TRIGGER

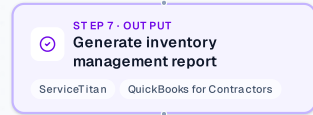
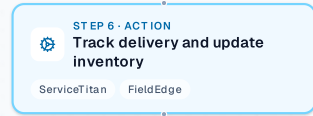
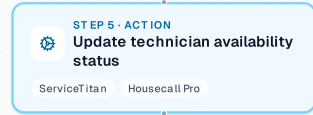
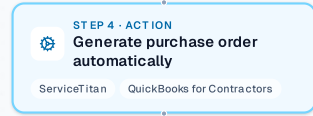
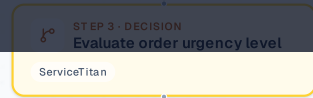
Inventory item quantity drops below predefined minimum threshold in ServiceTitan

## Visual Flow

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



ServiceTitan FieldEdge



## Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

## Inventory threshold alert triggered

ServiceTitan detects that a plumbing part or material has fallen below the minimum stock level. This automatically initiates the inventory replenishment workflow.

ServiceTitan

2

 ACTION

## Check upcoming job requirements

System analyzes scheduled plumbing jobs in the next 7 days to determine projected part usage. This helps calculate optimal reorder quantities based on actual demand.

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FieldEdge

3

 DECISION

## Evaluate order urgency level

Workflow determines if this is an emergency order (affecting jobs within 24 hours) or standard restock. Emergency orders trigger expedited processing and supplier notification.

ServiceTitan

4

 ACTION

## Generate purchase order automatically

System creates a purchase order with calculated quantities and sends to preferred supplier. Order details include part specifications, delivery address, and required delivery date.

5

 ACTION

### Update technician availability status

If critical parts are out of stock, system automatically flags affected technicians and reschedules jobs requiring those parts. Notifications are sent to dispatch and affected customers.

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Housecall Pro

6

 ACTION

### Track delivery and update inventory

System monitors supplier delivery confirmations and automatically updates inventory counts when parts arrive. Technicians receive notifications about restocked items.

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FieldEdge

7

 OUT PUT

### Generate inventory management report

Creates detailed report showing parts ordered, delivery status, inventory levels, and any service disruptions caused by stockouts. Report is distributed to management and procurement staff.

ServiceTitan

QuickBooks for Contractors



## Outputs

- Automated purchase orders sent to suppliers
- Updated inventory levels in ServiceTitan
- Technician scheduling adjustments for parts availability
- Inventory management performance report



## Key Metrics

- Inventory turnover rate
- Stockout incidents per month
- Average parts delivery time
- Cost savings from automated ordering



## Tools & Integrations

- ServiceTitan
- FieldEdge
- Housecall Pro
- QuickBooks for Contractors

## AI Business OS

## AI Business OS

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