

Material ordering and inventory management

This workflow automatically calculates material needs when a roofing job is approved and generates purchase orders while updating inventory levels. It ensures optimal stock levels and prevents project delays due to material shortages.

[Download PDF](#)

[Get Your Blueprint](#)

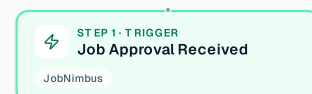


WORKFLOW TRIGGER

Roofing job estimate is approved and moved to active project status

Visual Flow

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





+
-
☐

Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

⚡ TRIGGER

Job Approval Received

A roofing estimate is approved by the customer and the project status changes to active in the CRM system. This triggers the automated material

2

 ACTION

Calculate Material Requirements

Extract job specifications and automatically calculate required quantities of shingles, underlayment, flashing, nails, and other materials based on roof measurements. Generate detailed material list with specifications.

SumoQuote

Hover

3

 ACTION

Check Current Inventory

Query existing warehouse inventory levels for all required materials and compare against calculated needs. Identify items that are out of stock or below minimum thresholds.

AccuLynx

4

 DECISION

Evaluate Stock Availability

Determine if current inventory can fulfill the project requirements or if additional materials need to be ordered. Branch workflow based on stock sufficiency.

AccuLynx

5

 ACTION

Generate Purchase Orders

AI Business OS

Automatically create purchase orders for insufficient materials, selecting preferred suppliers based on pricing and delivery schedules. Include project timeline requirements and delivery instructions.

AccuLynx

JobNimbus

6

 ACTION

Reserve Materials for Project

Allocate available inventory items to the specific project and update stock levels to prevent double-booking. Create material pick list for warehouse team.

AccuLynx

7

 OUTPUT

Update Project Material Status

Record all material allocations, purchase orders, and delivery schedules in the project management system. Notify project manager of material readiness status and any delivery delays.

JobNimbus



Outputs

- Automated purchase orders sent to suppliers

AI Business OS

- Updated inventory levels with project allocations
- Material readiness status in project dashboard
- Warehouse pick lists generated



Key Metrics

- Material order accuracy rate
- Average inventory turnover
- Project delay reduction due to material availability



Tools & Integrations

- JobNimbus
- SumoQuote
- Hover
- AccuLynx

AI Business OS

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

COMPANY

[About](#)

[Industries](#)

CONNECT

[MVP.dev](#)

[LinkedIn](#)

RESOURCES

[Articles](#)