

Supply Reorder & Inventory Replenishment

Field service readiness procedure

Portfolio project based on Juniper Vale Home Services, a fictional field-service company. Business data is synthetic.

Purpose

Keep critical service materials available without turning every low-stock condition into a scheduling stop. The procedure defines who reviews stock, when to reorder, how to handle stale information, and how shortages are escalated.

Role	Responsibility
Inventory Coordinator	Maintain item list, review counts, create replenishment actions and own shortage exceptions
Dispatch Lead	Use the current readiness state when scheduling and escalate when a critical item affects service
Field Supervisor	Confirm field consumption issues and support emergency replenishment decisions
Operations Manager	Approve material exceptions and review recurring readiness problems
Technicians	Record material use and report damaged/missing critical items

Readiness states

State	Meaning
READY	Current quantity and source information support planned work
WARNING	Coverage is tightening; replenishment is due, but work can continue under the normal rule
HOLD	A critical shortage blocks the affected work until resolved or explicitly authorized
STALE REVIEW	The quantity/source is too old to rely on and must be checked before use

Replenishment process

- Review current on-hand quantity, expected use, criticality, source freshness and lead time.
- Create the reorder action when the approved trigger is reached.
- Confirm the order, expected delivery and any immediate service risk.
- If a critical shortage affects scheduled work, open an exception with owner and due time.
- Receive and verify the shipment before updating available quantity.
- Close the exception only after the affected readiness condition is resolved.
- Review repeat shortages and adjust the reorder approach when the pattern supports a change.

Operating rule

Readiness informs scheduling, but it does not replace dispatch authority. A WARNING is not a hard stop. A critical HOLD or stale source must be resolved or handled through the approved exception path.