

TidyStock Business Workflow Map

Use this worksheet before implementation, a workflow review, or a TidyStock discovery session. Complete it with people who understand what physically happens — not only finance or administration.

Objective

Create one agreed picture of how stock moves through the business and how each physical event should be represented in TidyStock.

A. Your business in one paragraph

What do you buy, what happens to it, what do you sell, and to whom?

B. Draw your main flow

Cross out steps you do not use and add any that are missing.

**DEMAND → PURCHASE → RECEIVE → STORE → TRANSFORM / ASSEMBLE → FINISHED STOCK →
SELL → PICK / PACK → DISPATCH → INVOICE → CUSTOMER**

C. Describe each event

Event	What physically happens?	Who owns it?	How/when is it recorded in Tidy?
Demand / replenishment			
Purchase order			
Goods in transit			
Receive			
Store / locate			
Transform / assemble / repackage			
Customer order			

Allocate / reserve			
Pick / pack			
Dispatch			
Invoice			
Return / credit			
Damage / waste / adjustment			
Stocktake / cycle count			

D. Units and transformation

Question	Your answer
What units do we buy in?	
What units do we store in?	
What units do we sell in?	
Do we split packs, repackaging or convert units?	
Do we assemble/manufacture finished products?	
What normal waste/yield differences occur?	

E. Timing checkpoints

Checkpoint	When does this actually happen?	Can it differ from another date?
Customer order date		
Physical dispatch date		
Customer invoice date		
Supplier receipt date		
Supplier invoice date		

Physical stocktake date		
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F. Exceptions

Exception	Current process	Agreed Tidy process / action
Partial supplier delivery		
Short/over delivery		
Customer return		
Damaged stock		
Samples/free stock		
Waste/scrap		
Goods dispatched before final invoice		
Quantity/price changes after dispatch		
Other unusual workflow		

G. Management questions

What stockouts hurt us most?

What stock ties up the most cash?

What is slow/non-moving?

What transactions are often left incomplete?

What causes stock adjustments?

What customer-service problems originate in stock/process?

What do we currently discover too late?

H. Actions from this review

Action	Owner	By when	Training / configuration / process / product?

Sign-off question

Do the people who buy, receive, transform, sell and dispatch stock agree that this map describes what really happens? If not, resolve the disagreement before treating the workflow as complete.