

# FlowLogix Process Audit Checklist

Identify where your business is losing hours to manual processes.  
Rate each task, calculate your automation priority, and start fixing what matters most.

[flowlogix.ai](https://flowlogix.ai)

## Sheet 1: Order & Fulfillment

Fill in each row. Rate pain level 1-5 (5 = worst). The Priority Score = Hours x Pain Level.

Process / Task	Current Method	Hours/ Week	Pain 1-5	Auto?
How are orders received?	Manual / Email / Platform / API			
How are payments processed?	Manual / Stripe / PayPal			
How are shipping labels generated?	Manual / Integrated / 3PL			
How are customers notified of tracking?	Manual email / Automated / Mix			
How are returns/refunds handled?	Manual / Semi-automated / Automated			
How is order data entered into other systems?	Copy-paste / CSV / API			
How are order errors caught and corrected?	Manual / Auto checks / None			
<b>TOTALS</b>		—	—	

## Sheet 2: Inventory & Stock

Fill in each row. Rate pain level 1-5 (5 = worst). The Priority Score = Hours x Pain Level.

Process / Task	Current Method	Hours/ Week	Pain 1-5	Auto?
How many sales channels?	1 / 2-3 / 4+			
How are stock counts updated?	Manual / Scheduled / Real-time			
How often do you oversell?	Never / Monthly / Weekly / Daily			
How are reorders triggered?	Manual / Spreadsheet / Auto alerts			
How is inventory shared between systems?	Copy-paste / CSV / API / Not shared			
How are new products added to all channels?	Manual / Bulk upload / API			
How do you track what's selling vs. sitting?	Gut / Spreadsheet / Dashboard			
<b>TOTALS</b>		—	—	

## Sheet 3: Data & Integration

Fill in each row. Rate pain level 1-5 (5 = worst). The Priority Score = Hours x Pain Level.

Process / Task	Current Method	Hours/Week	Pain 1-5	Auto?
Which tools don't talk to each other?	CRM ↔ Accounting ↔ Sheets			
How many CSVs exported/imported per week?	0 / 1-5 / 6-10 / 10+			
Where is data manually re-entered?	CRM → Accting → Reports			
Which reports are built by hand?	Revenue / Inventory / Pipeline			
How are invoices generated and sent?	Manual / Semi-auto / Fully auto			
How is customer data kept in sync?	Manual / CSV / API / It isn't			
How do you handle data discrepancies?	Manual audit / Auto flags / Hope			
<b>TOTALS</b>		—	—	

## Sheet 4: Comms & AI Potential

Fill in each row. Rate pain level 1-5 (5 = worst). The Priority Score = Hours x Pain Level.

Process / Task	Current Method	Hours/Week	Pain 1-5	Auto?
How many repetitive emails does your team handle?	Per week estimate			
How are support tickets triaged?	Manual / Rules / AI-assisted			
What decisions need a human but follow patterns?	Approvals / Routing / Categorization			
Which documents get manually read/sorted?	Invoices / Contracts / Apps			
Where does info get lost between people?	Email / Slack / Verbal / Sheets			
How are follow-ups tracked?	Memory / Spreadsheet / CRM			
Which tasks could AI handle autonomously?	List 2-3 candidates			
<b>TOTALS</b>		—	—	

## Sheet 5: Scoring & Priority

Transfer your Hours/Week and Pain Level totals from each sheet. Priority Score = Hours × Pain Level. Higher scores = higher automation priority.

Process / Task	Source Sheet	Hours/Week	Pain 1-5	Priority Score	Auto?
How are orders received?	Order & Fulfillment				
How are payments processed?	Order & Fulfillment				
How are shipping labels generated?	Order & Fulfillment				
How are customers notified of tracking?	Order & Fulfillment				
How are returns/refunds handled?	Order & Fulfillment				
How is order data entered into other systems?	Order & Fulfillment				
How are order errors caught and corrected?	Order & Fulfillment				
How many sales channels?	Inventory & Stock				
How are stock counts updated?	Inventory & Stock				
How often do you oversell?	Inventory & Stock				
How are reorders triggered?	Inventory & Stock				
How is inventory shared between systems?	Inventory & Stock				
How are new products added to all channels?	Inventory & Stock				
How do you track what's selling vs. sitting?	Inventory & Stock				
Which tools don't talk to each other?	Data & Integration				
How many CSVs exported/imported per week?	Data & Integration				
Where is data manually re-entered?	Data & Integration				
Which reports are built by hand?	Data & Integration				
How are invoices generated and sent?	Data & Integration				
How is customer data kept in sync?	Data & Integration				
How do you handle data discrepancies?	Data & Integration				
How many repetitive emails does your team handle?	Comms & AI Potential				
How are support tickets triaged?	Comms & AI Potential				
What decisions need a human but follow patterns?	Comms & AI Potential				
Which documents get manually read/sorted?	Comms & AI Potential				
Where does info get lost between people?	Comms & AI Potential				
How are follow-ups tracked?	Comms & AI Potential				
Which tasks could AI handle autonomously?	Comms & AI Potential				
<b>TOTALS</b>		—	—	—	

## NEXT STEPS

1. Start with your highest Priority Score — those are your biggest time sinks.
2. Focus on tasks marked 'Yes' for Automatable first — quick wins with real impact.
3. Each hour saved per week = 52 hours/year. Even small automations compound.
4. Ready to fix these? Reach out at [flowlogix.ai/contact](https://flowlogix.ai/contact)