

Start with one complete order brief

Use one worksheet per product version and destination. Keep unresolved items open until someone answers them.

RECORD

- ☐ Record the product reference, exact variant, quantity and destination country or postcode.
- ☐ Mark the order stage: sourcing, sample, stock already ordered, or ready to fulfil.
- ☐ Name the person who can approve changes and the date a decision is needed.

CONFIRM

- ☐ Ask what information is missing before a usable quote can be prepared.
- ☐ Confirm the next reply or decision date, including any supplier-dependent timing.
- ☐ Save the agreed brief with its version and date so later messages refer to the same request.

PAUSE WHEN

Do not commit stock or a customer delivery promise while the product, destination or required work is still unclear.

Define the product you will accept

A link or photograph is a starting reference. Write down the details that decide whether the delivered item is acceptable.

RECORD

- ☐ Record material, dimensions, colour, model, included parts and any label or packaging requirement.
- ☐ List defects or substitutions that require approval before the order can move.
- ☐ Keep the approved sample or specification reference with the order brief.

CONFIRM

- ☐ Ask which details the supplier has confirmed and which still need a sample or test.
- ☐ Agree who decides whether a sample passes, and what evidence supports that decision.
- ☐ Confirm how a revision changes price, minimum quantity, lead time or existing stock.

PAUSE WHEN

Pause if the proposed version cannot be matched to the approved specification. Approve an alternative explicitly.

Compare a complete quote

Compare the same product, packing, quantity, destination and service. Keep temporary discounts separate from repeat costs.

RECORD

- ☐ Record item cost, packing, shipping, currency and any separately charged work.
- ☐ Record the packed dimensions and weight used for the shipping quote.
- ☐ Set the cash limit for samples, stock, setup and the first order, including freight.

CONFIRM

- ☐ Ask what is included, what is excluded and which changes can alter the price.
- ☐ Confirm supplier and packaging minimums separately from any fulfilment minimum.
- ☐ Agree the payment reference, expiry or reconfirmation point and approval for extra charges.

PAUSE WHEN

Do not compare item prices alone or authorise payment against a quote whose product or destination has changed.

Set product checks and stop points

Choose the evidence needed for your exact product and market. Separate a visible packing check from specialist testing.

RECORD

- ☐ List the product, included-part and packing defects that should stop dispatch.
- ☐ Record the sample, test report or certification reference required for the intended market.
- ☐ Name the person qualified to decide any unresolved safety or compliance question.

CONFIRM

- ☐ Confirm the inspection scope, sampling approach and evidence available when a defect is found.
- ☐ Ask which checks are excluded and whether specialist work needs a separate provider or fee.
- ☐ Agree the approval path for rework, replacement, rejection or release of an affected batch.

PAUSE WHEN

Hold the affected product if its required acceptance evidence is missing. A quotation or packing photo cannot fill that gap.

Map stock to the delivery promise

Receiving, replenishment, dispatch, carrier collection and delivery are separate events with separate dependencies.

RECORD

- ☐ Record stock on hand, expected inbound stock and the exact version available for sale.
- ☐ Record the destination, service, customs information and delivery estimate you intend to use.
- ☐ Identify supplier, warehouse, forwarder and carrier operating dates relevant to the order.

CONFIRM

- ☐ Confirm when each timing estimate starts and what can delay it.
- ☐ Check product and route restrictions before advertising a delivery window.
- ☐ Agree what happens if stock is late, a service is unavailable or a customer address is incomplete.

PAUSE WHEN

Do not treat pre-stock as proof that dispatch or collection operates through a holiday. Confirm each operator's schedule.

Test one order through the workflow

A bounded test checks the specific workflow you intend to use. Include the cost of the test in your budget.

RECORD

- ☐ Record how orders reach the provider and how tracking returns to your store.
- ☐ Set the start-order reference and identify steps that still require manual action.
- ☐ List who can create, change, cancel or approve an order and the access each person needs.

CONFIRM

- ☐ Follow a test order through product mapping, packing instructions, dispatch and tracking.
- ☐ Check the change or cancellation stop point before enabling a live workflow.
- ☐ Record the result of each acceptance check and resolve failures before expanding the test.

PAUSE WHEN

Keep live orders paused when product mapping, order ownership or tracking updates do not match the agreed workflow.

Prepare for an exception

Give every open issue an owner, next action and update date. An acknowledgement does not close the issue.

RECORD

- ☐ Record the order reference, issue, delivery date and supporting photos or tracking evidence.
- ☐ Record the relevant reporting deadline, remedy and party responsible for each cost.
- ☐ Name the person who can approve a replacement, resend, refund or other resolution.

CONFIRM

- ☐ Check current after-sales terms before publishing your customer-support instructions.
- ☐ Confirm the next update and any supplier or carrier evidence still needed.
- ☐ Close the issue only when the agreed outcome and its supporting evidence are available.

PAUSE WHEN

Do not assume a reply, tracking number or proposed remedy proves the customer's issue is resolved.

Agree access, handover and the go decision

Keep commercial approval separate from product, route and data-access questions. Record who accepted each part.

RECORD

- ☐ List the product, supplier, customer and order information each party needs to fulfil its role.
- ☐ Record any confidentiality, exclusivity, retention, deletion or access requirement in the agreed terms.
- ☐ Record the stock-transfer, order-record export and open-order plan if the arrangement ends.

CONFIRM

- ☐ Confirm who may access or share each type of information before sending it.
- ☐ Check that the product, quote, packing, route, test-order and exception steps are accepted.
- ☐ Name the final approver, approved spending limit and condition that will pause or stop the order.

PAUSE WHEN

Proceed only with the permissions and order scope actually agreed. Leave unresolved requirements visible and unapproved.