# 01 Procurement brief

Define the buying requirement before requesting comparable offers.

## 01 Project and commercial requirements

| Field | Buyer input | Field | Buyer input |
|---|---|---|---|
| Project / RFQ reference | | Revision / date | |
| Buyer company / contact | | Destination / delivery place | |
| Business email | | Required arrival / flexibility | |
| Intended use / project stage | | Budget / currency (optional) | |
| Requested trade term / named place | | Payment constraints | |
| Required services / scope | | Buyer / BHC / supplier roles | |

## 02 Item requirements

| Item ID / category | Description / drawing revision | Quantity / unit / order frequency | Mandatory specification / acceptance criterion |
|---|---|---|---|
| | | | |
| | | | |
| | | | |
| | | | |

## 03 Clarifications and release to sourcing

| Requirement | Detail / document reference | Owner / due date | Decision / approval evidence |
|---|---|---|---|
| Packaging / shipping marks | | | |
| Destination requirements to verify | | | |
| Samples / testing / inspection scope | | | |
| Open questions / acceptable alternatives | | | |
| Brief approved for quotation | | | |

Use one item ID per product. Link drawings and list mandatory requirements separately from preferences.

# 02 Quotation comparison

Compare one item or an identical basket across up to three offers.

## 01 Comparison basis

| Field | Buyer input | Field | Buyer input |
|---|---|---|---|
| RFQ / item / quantity / unit | | Specification revision | |
| Common cost scope / named place | | Comparison currency | |
| Prepared by / date | | FX source / date | |

## 02 Offers and normalized cost

| Comparison field | Offer A | Offer B | Offer C |
|---|---|---|---|
| Supplier / quotation reference | | | |
| Quotation currency | | | |
| Unit price (quotation currency) | | | |
| Comparison quantity (same unit) | | | |
| Goods subtotal (calculated) | | | |
| Discount amount (quotation currency) | | | |
| Extra costs to common scope (quotation currency) | | | |
| Extra-cost breakdown / excluded or unknown costs | | | |
| FX: comparison currency per 1 quotation currency | | | |
| Comparable subtotal (calculated) | | | |
| Trade term / named place / rules version | | | |
| Validity date / MOQ / payment terms | | | |
| Lead time / start trigger / shipping assumption | | | |
| Specification fit / sample / warranty exceptions | | | |

## 03 Buyer decision

| Review | Finding / selected offer | Owner / date | Written decision reference |
|---|---|---|---|
| Scope differences / unresolved costs | | | |
| Selection rationale / conditions | | | |

Duplicate this sheet for a different basket. Enter a numeric zero for confirmed nil charges. Blank means unknown. Add only excluded costs needed for the common scope. Calculated subtotals exclude unknown or unentered costs.

# 03 Specification and sample approval

Record exactly what was reviewed and what may be released to production.

## 01 Controlled references

| Field | Input | Field | Input |
|---|---|---|---|
| Order / item / supplier | | Revision / issue date | |
| Drawing / specification reference | | Sample ID / location / photographs | |
| Requested by / reviewed by | | Buyer approver / target date | |

## 02 Technical and packaging review

| Requirement | Agreed specification / measurable limit | Decision / reviewer / date | Evidence / exception / action |
|---|---|---|---|
| Material / grade / composition | | | |
| Dimensions / tolerances / interfaces | | | |
| Finish / color / workmanship | | | |
| Function / performance / test method | | | |
| Destination requirements / documents | | | |
| Sample / golden reference | | | |
| Packaging / labels / shipping marks | | | |
| Quantity / accessories / spare parts | | | |

## 03 Approval and change control

| Record | Detail | Responsible person / date | Evidence reference |
|---|---|---|---|
| Decision: Pending / Approved / Rejected | | | |
| Conditions to resolve before release | | | |
| Buyer approval for production release | | | |
| Change / impact on price and timing | | | |
| Revised approval / superseded version | | | |

An approval must identify the version, the approver and the evidence. Changes after approval require a revised record.

# 04 Milestone schedule

Keep planned dates, current forecasts and completion evidence in one record.

## 01 Order controls

| Field | Input | Field | Input |
|---|---|---|---|
| Project / order / revision | | Last updated / updated by | |
| Buyer contact / BHC coordinator | | Suppliers / service providers | |
| Requested arrival / destination | | Agreed handover / named place | |

## 02 Milestones

| Milestone | Owner / dependency | Planned / forecast date | Actual date / status / evidence |
|---|---|---|---|
| Brief confirmed | | | |
| Offer and order scope approved | | | |
| Specification / sample approved | | | |
| Production release confirmed | | | |
| Production progress review | | | |
| Inspection / corrective actions | | | |
| Multi-supplier consolidation ready | | | |
| Documents / shipment release | | | |
| Carrier handover / departure | | | |
| Estimated arrival / receipt | | | |

## 03 Exceptions and next actions

| Issue / dependency | Action / impact on cost or timing | Owner / due date | Status / approval evidence |
|---|---|---|---|
| | | | |
| | | | |
| | | | |

Use YYYY-MM-DD. Record dates only when agreed. Arrival forecasts remain subject to transport confirmation.

# 05 Inspection and shipment checklist

Review agreed inspection scope, shipment readiness and outstanding release decisions.

## 01 Scope and references

| Field | Input | Field | Input |
|---|---|---|---|
| Order / supplier / shipment | | Approved specification revision | |
| Inspector / appointed provider | | Inspection date / location | |
| Method / sampling / acceptance limits | | Logistics provider / handover point | |

## 02 Readiness review

| Checkpoint | Acceptance criterion / document reference | Result | Reviewer / date / finding / action / owner / due date |
|---|---|---|---|
| Item / quantity / packing list match | | | |
| Dimensions / material / finish | | | |
| Function / agreed testing | | | |
| Inspection report / corrective action | | | |
| Export packing / protection | | | |
| Labels / shipping marks / traceability | | | |
| Carton count / weight / volume | | | |
| Invoice / packing list consistency | | | |
| Destination documents as applicable | | | |
| Booking / pickup / handover details | | | |

## 03 Shipment release

| Release record | Decision / outstanding conditions | Authorized person / date | Approval / handover evidence |
|---|---|---|---|
| Unresolved exceptions / accepted deviations | | | |
| Shipment release: Hold / Released | | | |
| Handover confirmation / document pack | | | |

Use Pending / Pass / Fail / N/A. N/A requires a reason. A checklist entry does not replace an inspection report.

# 06 Delivery issue record

Record any delivery discrepancies and follow the agreed remedy through to closure.

## 01 Issue identification

| Field | Input | Field | Input |
|---|---|---|---|
| Issue ID / order / item / batch | | Reported by / date | |
| Supplier / carrier / delivery place | | Receipt date / affected quantity / unit | |
| Issue type / urgency / business impact | | Total received / checked quantity | |

## 02 Evidence and containment

| Record | Observed facts / document reference | Owner / due date | Status / evidence |
|---|---|---|---|
| Expected requirement vs. observed result | | | |
| Product / packaging / label photographs | | | |
| Delivery receipt / inspection / order records | | | |
| Immediate containment / stock segregation | | | |
| Parties notified / response requested | | | |

## 03 Remedy and closure

| Action | Agreed detail / written reference | Owner / target date | Completion evidence / confirmation |
|---|---|---|---|
| Investigation / cause confirmation | | | |
| Remedy / quantity / replacement or credit | | | |
| Cost allocation / currency / written agreement | | | |
| Next update / agreed completion date | | | |
| Corrective action / recurrence prevention | | | |
| Buyer closure acceptance / date | | | |

Keep original photographs and records. Record the agreed responsibilities and costs without assuming liability.