

FINAL PRE-ORDER QUOTATION CHECKLIST

UK garage / dealer customer quotation and pre-order record template

Important: This template is a general business document for recording vehicle quotations, customer options, finance discussions, pricing decisions, deposits, extras and pre-order evidence. It is not legal, tax, accounting or financial advice. Have it checked by a qualified adviser for your exact business, finance permissions, consumer process and jurisdiction before relying on it.

Form reference / quote number:	Date:	Staff member:
Vehicle registration:	Customer / buyer:	Salesperson:

Purpose

Used before creating the sales order.

Details to Record

Customer name:	Vehicle registration:
Final quoted price:	Deposit agreed:
Part-exchange agreed:	Finance quote selected:
Finance disclosure completed:	Warranty option selected:
Extras selected:	Delivery/collection agreed:
Quote accepted:	Sales order created:

Notes / Supporting Evidence

Notes, supporting evidence, customer communications, quote references or follow-up action:

Signatures / Acceptance

Staff member signature: _____	Manager signature: _____
Date: _____	Time / reference: _____