

# QUOTE COMPLIANCE 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 internally before the quote is sent to the customer.

## Details to Record

Vehicle registration:	Vehicle description checked:
Mileage checked:	Price checked:
Mandatory fees included:	Optional fees clearly marked:
Finance quote accurate:	Commission disclosure included, if finance discussed:
Part-exchange figure checked:	Warranty terms attached:
Distance sale information added, if applicable:	Manager review required? [ ] Yes [ ] No

## Notes / Supporting Evidence

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

## Signatures / Acceptance

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