

# QUOTE FOLLOW-UP RECORD

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 to track customer follow-up after a quote.

## Details to Record

Customer name:	Vehicle registration:
Quote number:	Quote issue date:
Quote expiry date:	Follow-up date 1:
Follow-up date 2:	Follow-up method:
Phone:	Email:
SMS:	WhatsApp:
Customer response:	Next action:
Salesperson name:	

## Notes / Supporting Evidence

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

## Signatures / Acceptance

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