

CLEAN ORDER CHECKLIST

How to Turn Every Accepted
Quote Into a Zero-Rework Order



CATEGORY	CHECKLIST ITEM	STATUS
PRODUCT & CONFIGURATION	All SKUs are correct	☐
	Quantities are accurate	☐
	No missing components	☐
	Bundles are clearly structured	☐
PRICING & MARGIN	Final price matches approved quote	☐
	Discounts are clearly applied	☐
	Margin is within acceptable limits	☐
	No version mismatch in pricing	☐
CUSTOMER DETAILS	Billing information is complete	☐
	Shipping details are accurate	☐
	Contact information is verified	☐
	Special instructions are included	☐
DISTRIBUTOR & SOURCING	Distributor selected for each item	☐
	Availability is confirmed	☐
	Cost and pricing are validated	☐

CATEGORY	CHECKLIST ITEM	STATUS
APPROVALS & VERSION CONTROL	Correct quote version is used	☐
	All approvals are recorded	☐
	No outdated versions in use	☐
POST-APPROVAL INTEGRITY	No edits made after approval	☐
	Changes captured as new version (if any)	☐
NOTES & DOCUMENTATION	Internal notes added for ops	☐
	Delivery expectations defined	☐
	Customer-specific requirements included	☐