

Parts Order Worksheet



Customer Information

Date _ / _ / _	Customer Name _____	Machine Model _____	Serial Number _____
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Part Name / Part Number	Availability	Price	Shipping Method	ETA / Lead time	Shipping Cost
	<input type="checkbox"/> In stock <input type="checkbox"/> Other Branch <input type="checkbox"/> Central Warehouse		<input type="checkbox"/> Standard <input type="checkbox"/> Expedited <input type="checkbox"/> Freight <input type="checkbox"/> Pick up		
	<input type="checkbox"/> In stock <input type="checkbox"/> Other Branch <input type="checkbox"/> Central Warehouse		<input type="checkbox"/> Standard <input type="checkbox"/> Expedited <input type="checkbox"/> Freight <input type="checkbox"/> Pick up		
	<input type="checkbox"/> In stock <input type="checkbox"/> Other Branch <input type="checkbox"/> Central Warehouse		<input type="checkbox"/> Standard <input type="checkbox"/> Expedited <input type="checkbox"/> Freight <input type="checkbox"/> Pick up		
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	<input type="checkbox"/> In stock <input type="checkbox"/> Other Branch <input type="checkbox"/> Central Warehouse		<input type="checkbox"/> Standard <input type="checkbox"/> Expedited <input type="checkbox"/> Freight <input type="checkbox"/> Pick up		

Before You Close

- All four questions answered clearly for each part
 Checked mates & relates (S-BOM)
 Mentioned current promotions if applicable
 Repeat orders for same machine? Consider connecting customer with a PSSR

Follow-Up

Expected Delivery	<input type="checkbox"/> Sent tracking / ETA to customer	Follow-up by (date)	<input type="checkbox"/> Done

Note

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