

Order document checklist

Use this checklist to agree a document package for a specific order.

01 Order references

List the purchase order, line-item numbers, product descriptions, quantities and any customer document numbering rules.

02 Required records

Identify the records requested by the contract, such as an approved drawing, dimensional report, packing list or material documentation. Do not assume that every record applies to every item.

03 Traceability fields

Where required, ask for the identifiers linking the supplied item, its marking and the applicable material record. Specify any heat or batch reference requirements.

04 Review milestones

Agree which documents are needed before approval, during manufacture, before dispatch and with delivery. Record the responsible reviewer and requested dates.

05 Acceptance and format

State the required language, file formats, revision status and any signature or approval requirements. Confirm availability with JINYI before committing the document list.

06 Close the register

When files arrive, record their filenames, revisions, dates and review status in the document register. Ask for clarification where information is missing or inconsistent.