BUILD A BETTER ORDER FORM

CONTENTS	DETAILS	DO I HAVE IT?
LOGO	Prominently featured	☐
CONTACT DETAILS	Address, phone, email, website	☐
CALL TO ACTION	Tell buyers how to place their order	☐
ORDER DATE	Date order was placed with my company	☐
INVOICE NUMBER	Assign a number so you can track this order	☐
PURCHASE ORDER #	If customer supplies a PO, reference it here	☐
WHOLESALE TERMS	Payments, shipping, lead time, minimums etc..	☐
SALES REP	If a commission is to be paid, to whom?	☐
STORE NAME	Name of the sales channel	☐
BUYER NAME	My contact person	☐
BUYER EMAIL	Ideally, I'll collect both phone + email	☐
BUYER PHONE	Good idea to circle preferred contact method	☐
DELIVERY ADDRESS	Where will this order be shipped?	☐
BILLING ADDRESS	If the billing address differs from the shipping address, then collect those details	☐
ESTIMATED SHIP DATE	When do I anticipate having the order ready?	☐
RESALE OR TAX ID#	Resale ID is required if the store is in my state	☐
PAYMENT DETAILS	If paying by credit card, I'll need to collect the card type, card #, expiration date + vcc code	☐
INVOICE TOTAL	Tally it all up!	☐
ORDER NOTES	A spot for any additional information	☐
SIGNATURE OF BUYER	To act as an approval of the order + policies	☐
DATE OF REVISION	Indicate the date of last revision near the bottom of the form, or state near the top what period of time this form is valid through	☐

PRODUCT INFO	DETAILS	DO I HAVE IT?
PRODUCT NAME	The official name of the product	☐
ITEM NUMBER	The product number or product code	☐
WHOLESALE PRICE	Expressed as "each" or "per unit"	☐
PRODUCT VARIANTS	Available colors, sizes, flavors, etc...	☐
MIN. OR CASE QUANTITY	How many must the buyer purchase?	☐
LINE ITEM TOTAL	The total dollars spent on this single product	☐

WHOLESALE TERMS

PAYMENT METHODS	Accepted payment methods clearly identified	☐
SHIPPING SERVICE	Method(s) of shipment should be stated	☐
SHIPPING INCENTIVE	If a shipping incentive is available, list it	☐
LEAD TIMES	# of days from order acceptance until shipment?	☐
RETURN POLICY	Under what circumstance will I accept a return?	☐
TESTER POLICY	If selling consumables, how will testers be offered?	☐
ORDER MINIMUMS	Opening & reorder minimums should be identified	☐

STYLE

ORGANIZED LOGICALLY	Like items are grouped together; "total" boxes are provided; all buyer information is collected in a single area.	☐
LEGIBLE FONTS	Fonts are neither too fancy nor too tiny	☐
WELL-BRANDED	The overall aesthetic matches my brand	☐
FILE TYPE + SIZE	Final version is a PDF with a file size <500 KB	☐