

Vendor/Supplier File Checklist

Maintain a file for each of your vendors and potential suppliers.

Keep the following items in each file:

- ☐ Current catalog or price list, complete with product descriptions
- ☐ Business cards from any sales or support personnel with whom you have dealt
- ☐ A list of all distribution facilities
- ☐ Discount schedules, including minimum purchase requirements
- ☐ Delivery options, including estimated delivery time
- ☐ Technical assistance and other services available
- ☐ Return policy
- ☐ Warranty information
- ☐ Information on any co-op advertising plans offered by the supplier, including special promotional and grand opening programs
- ☐ Any request for quotations
- ☐ Copies of all invoices
- ☐ Telephone numbers, including toll-free numbers, for all appropriate contacts
- ☐ Discount terms for prompt payment
- ☐ All shipping methods available and their terms
- ☐ Information on terms for long-term contracts
- ☐ Any special terms for seasonal items
- ☐ Lease options
- ☐ Information on all other services offered by the vendor/supplier