[Company name]

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Sales-to-Delivery Handover Form

Handing a won order from sales to delivery cleanly: what was sold, what was promised, delivery information, and signed acceptance.

Document	Sales-to-Delivery Handover Form
Prepared by	[Name and role]
Owner	[Name and role]
Version	1.0
Date	[DD Month YYYY]
Review date	[DD Month YYYY]

Handover header

Field	Entry
Salesperson	[Salesperson name]
Delivery lead	[Delivery lead name]
Client company	[Client company]
Client contact	[Client contact]
Order reference	[Order reference]
Handover date	[Handover date]
Delivery start date	[Delivery start date]

What was sold

Item / service	Quantity	Agreed specification

Client commitments and promises

Commitment	Detail agreed	Confirmed

[Company name]

Delivery information

Field	Entry
Delivery address	
Site access notes	
Client contact for delivery days	[Client contact]
Risks or sensitivities	
Documents attached	

Handover acceptance

Field	Entry
Accepted by (delivery lead)	[Delivery lead name]
Acceptance date	
Open questions	
Salesperson signature and date	
Delivery lead signature and date	

Completion checklist

	The order reference ([Order reference]) matches the accepted order.
	Every promise made to [Client company] is written in the commitments section.
	The delivery lead ([Delivery lead name]) has signed acceptance of the handover.