[Company name]

How to use this document: delete this paragraph before saving, sharing, or circulating it. Every part shown in blue is yours to replace: type your own details over each blue [field] until no blue remains. Then select all (Ctrl+A) and set the font colour to the same dark colour throughout. What is left is your finished document.

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 **Version:** 1.0

Prepared by: _____ **Owner:** _____

Date: _____ **Review date:** _____

Handover header: Salesperson: _____ **Delivery lead:** _____

Client company: _____ **Client contact:** _____

Order reference: _____ **Handover date:** _____

Delivery start date: _____ **What was sold:**

Item / service	Quantity	Agreed specification

Client commitments and promises

Commitment	Detail agreed	Confirmed

Delivery information: Delivery address: _____ **Site access notes:** _____

Client contact for delivery days: _____ **Risks or sensitivities:** _____

Documents attached: _____

Handover acceptance: Accepted by (delivery lead): _____ **Acceptance date:** _____

Open questions: _____ **Salesperson signature and date:** _____

Delivery lead signature and date: _____

Completion checklist: [ ] The order reference ([Order reference]) matches the accepted order.

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[ ] Every promise made to [Client company] is written in the commitments section.

[ ] The delivery lead ([Delivery lead name]) has signed acceptance of the handover.