ADAM
PROCUREMENT MADE EASY

SUPPLIER QUOTE CONTROL CHECKLIST

Supplier Quote Control Checklist

10 questions to ask before you approve the next purchase.

PURPOSE

Use this checklist to review whether your supplier quotation process is clear, traceable and ready to support better purchasing decisions.

Introduction

Supplier quotes often look simple.

A supplier sends a price. Someone forwards it for approval. A manager says yes. Procurement proceeds. Finance checks the invoice later.

But as a business grows, supplier quotation decisions become harder to control.

More departments start buying. More suppliers are invited to quote. More versions of quotations appear. More people need to approve decisions. Finance needs better supporting records. Leadership wants confidence that the business is comparing suppliers properly.

When quotes are managed through email threads, attachments, shared folders and spreadsheets, the business may still be able to buy — but it may not have a clear quotation trail.

This checklist is designed to help growing businesses review whether their supplier quotation process is clear, traceable and ready to support better purchasing decisions.

Use it before approving your next purchase.

> **Scope of this checklist.** This checklist describes good procurement practice for managing supplier quotations. It is not a product capability checklist for ADAM-Procure or any other system. Some items may be handled through internal processes, procurement policies, finance controls, ERP systems, shared templates or procurement platforms, depending on how your organisation operates.

The focus is simple: before your business approves a supplier quote, can you find, compare, explain and trust the quotation trail behind the decision?

Who should use this checklist

- Procurement managers who want better control over supplier quotations
- Finance teams that need clearer supporting records before invoices arrive
- Operations leaders who want faster supplier decisions
- Managing directors who want better visibility over purchasing activity
- Admin and purchasing teams still managing quotes through email and Excel
- Growing businesses that want to reduce manual chasing and improve purchasing discipline

How to use it

Work through each of the 10 questions.

1. **Read "What good looks like".** The practical standard for each question.
2. **Note the gaps.** Tick every statement under "Where you may have gaps" that is true for your business.
3. **Rate your process.** Use the number of gaps ticked to mark Green, Amber or Red.

GREEN — READY

0–1 gaps ticked. Your process is mostly structured and visible.

AMBER — NEEDS IMPROVEMENT

2–3 gaps ticked. Some controls exist, but the process still relies on manual follow-up or individual knowledge.

RED — HIGH RISK

4 or more gaps ticked. The process is unclear, inconsistent or difficult to trace.

THE TEN QUESTIONS

Work through each question

1

QUESTION 1

Is the purchase need clear before suppliers are asked to quote?

Supplier quotation control starts before the quote is requested. If the business is unclear about what it needs, suppliers may respond with different assumptions. That makes comparison harder and approval less reliable.

WHAT GOOD LOOKS LIKE

- ✓ What is being purchased
- ✓ Why the purchase is needed
- ✓ The required quantity or scope
- ✓ Delivery or service expectations
- ✓ Required timing
- ✓ Budget or estimated value
- ✓ Department, project or cost centre
- ✓ Any required specifications
- ✓ Whether the purchase is routine, urgent or exceptional
- ✓ Who owns the request

WHERE YOU MAY HAVE GAPS

- ☐ Requests are vague or incomplete
- ☐ Suppliers receive different instructions
- ☐ Requirements change after quotes are received
- ☐ The requester explains the need verbally or through email only
- ☐ Procurement has to ask basic clarification questions later
- ☐ Approvers do not understand why the purchase is needed
- ☐ Finance only sees the purpose when the invoice arrives

YOUR RATING

- ○ **Ready** — Green · 0–1 gaps
- ○ **Needs improvement** — Amber · 2–3 gaps
- ○ **High risk** — Red · 4+ gaps

RECOMMENDED IMPROVEMENT

Standardise the information captured before supplier quotes are requested. The clearer the request, the easier it is to compare supplier responses and approve the right purchase.

2

QUESTION 2

Do all invited suppliers receive the same requirements?

Supplier comparison is only useful when suppliers are responding to the same need. If each supplier receives different instructions, the business may end up comparing prices that are not truly comparable.

WHAT GOOD LOOKS LIKE

- ✓ Which suppliers were invited
- ✓ What requirements were sent to each supplier
- ✓ Whether all suppliers received the same scope
- ✓ Whether any clarifications were shared consistently
- ✓ Whether revised requirements were communicated properly
- ✓ Whether suppliers had the same response deadline
- ✓ Whether differences in supplier responses are understood

WHERE YOU MAY HAVE GAPS

- ☐ Suppliers are contacted separately by different staff
- ☐ Requirements are copied and pasted manually into emails
- ☐ Some suppliers receive more detail than others
- ☐ Clarifications are handled in separate email threads
- ☐ Revised requirements are not shared consistently
- ☐ It is unclear whether suppliers quoted against the same scope
- ☐ Supplier responses are difficult to compare fairly

YOUR RATING

Ready	Needs improvement	High risk
Green · 0–1 gaps	Amber · 2–3 gaps	Red · 4+ gaps

RECOMMENDED IMPROVEMENT

Keep a clear record of the requirements sent to suppliers. For higher-value or more complex purchases, make sure clarifications and changes are visible to the relevant internal team before a decision is made.

3

QUESTION 3

Do you know which suppliers were invited to quote?

A supplier quote decision should not only show who was selected. It should also show who was considered. This helps procurement, finance and leadership understand whether the business used an appropriate sourcing approach for the purchase.

WHAT GOOD LOOKS LIKE

- ✓ Which suppliers were invited
- ✓ Why those suppliers were selected
- ✓ Which suppliers responded
- ✓ Which suppliers declined or did not respond
- ✓ Whether the supplier list was appropriate for the purchase
- ✓ Whether the selected supplier was already approved or known
- ✓ Whether any new supplier needed review before proceeding

WHERE YOU MAY HAVE GAPS

- ☐ Supplier invitations are only visible in email threads
- ☐ The team cannot easily see who was invited
- ☐ Some suppliers are contacted informally
- ☐ There is no record of non-responses
- ☐ Supplier selection depends on individual memory
- ☐ The same supplier is repeatedly used without review
- ☐ New suppliers are introduced without a clear check

YOUR RATING

Ready	Needs improvement	High risk
Green · 0–1 gaps	Amber · 2–3 gaps	Red · 4+ gaps

RECOMMENDED IMPROVEMENT

Maintain a simple record of invited suppliers, responses and non-responses. This helps the business understand the quotation process behind each supplier decision.

4

QUESTION 4

Can you identify the final quote version?

Version control is one of the most common problems in supplier quotation management. A supplier may send an original quote, then a revised price, then an updated delivery date, then another version after negotiation.

WHAT GOOD LOOKS LIKE

- ✓ Which quote version is final
- ✓ When the final quote was received
- ✓ What changed from earlier versions
- ✓ Whether the final version was reviewed by the right people
- ✓ Whether the final version was the one approved
- ✓ Whether the final quote is easy to retrieve
- ✓ Whether the purchase order or invoice is based on the approved version

WHERE YOU MAY HAVE GAPS

- ☐ Multiple quote versions sit in different email threads
- ☐ File names are inconsistent
- ☐ Revised prices are not clearly marked
- ☐ Approvers may have reviewed an earlier quote
- ☐ Procurement has to search inboxes for the final version
- ☐ Finance cannot confirm which quote supports the invoice
- ☐ Supplier revisions are tracked manually

YOUR RATING

Ready	Needs improvement	High risk
Green · 0–1 gaps	Amber · 2–3 gaps	Red · 4+ gaps

RECOMMENDED IMPROVEMENT

Create a clear way to mark and store the final quote version. The approved quote should be easy to identify and accessible to procurement, finance and relevant approvers.

5

QUESTION 5

Are supplier quotes compared using clear criteria?

Price is important, but it is not always the only factor. A supplier may offer a lower price but a longer lead time. Another may offer stronger warranty terms. Another may already understand your business better.

WHAT GOOD LOOKS LIKE

- ✓ Price
- ✓ Delivery timeline
- ✓ Scope or specification fit
- ✓ Payment terms
- ✓ Warranty or after-sales support
- ✓ Supplier reliability
- ✓ Service quality
- ✓ Compliance or documentation requirements
- ✓ Past performance
- ✓ Business urgency

WHERE YOU MAY HAVE GAPS

- ☐ Supplier comparison is done informally
- ☐ Price is considered without other practical factors
- ☐ Comparison notes are not documented
- ☐ Approvers receive a recommendation without context
- ☐ Different departments compare suppliers differently
- ☐ Supplier risks are not recorded
- ☐ It is difficult to explain why one supplier was selected

YOUR RATING

○ **Ready**
Green · 0–1 gaps

○ **Needs improvement**
Amber · 2–3 gaps

○ **High risk**
Red · 4+ gaps

RECOMMENDED IMPROVEMENT

Use a simple comparison approach that matches the value and complexity of the purchase. Not every decision needs a tender process, but important purchases should have a clear basis for supplier selection.

6

QUESTION 6

Is the recommendation clear before approval?

Approvers should not have to reconstruct the supplier decision themselves. Before approval, the team should be able to present a clear recommendation with enough context to support a decision.

WHAT GOOD LOOKS LIKE

- ✓ Which supplier is recommended
- ✓ What the supplier quoted
- ✓ Why this supplier is preferred
- ✓ Whether other suppliers were considered
- ✓ Any key risks or trade-offs
- ✓ Whether the supplier is approved or needs review
- ✓ Whether the purchase is within budget or expected value
- ✓ What happens next if approved

WHERE YOU MAY HAVE GAPS

- ☐ Approvers receive only the quote attachment
- ☐ The recommendation is explained verbally
- ☐ The reason for selection is unclear
- ☐ Supplier trade-offs are not documented
- ☐ Procurement has to answer repeated follow-up questions
- ☐ Approval depends on the approver searching through emails
- ☐ There is no record of the recommendation

YOUR RATING

- ○ **Ready** — Green · 0–1 gaps
- ○ **Needs improvement** — Amber · 2–3 gaps
- ○ **High risk** — Red · 4+ gaps

RECOMMENDED IMPROVEMENT

Make the recommendation visible and practical. Approvers should have enough information to decide without searching through long email threads or asking basic questions again.

7

QUESTION 7

Is the approval linked to the quote and supporting documents?

A supplier quotation only becomes a purchasing decision when it is approved. If the approval is separated from the quote, the business may struggle later to prove what was approved.

WHAT GOOD LOOKS LIKE

- ✓ The purchase request
- ✓ The selected supplier
- ✓ The final quote version
- ✓ Comparison or recommendation notes
- ✓ Supporting documents
- ✓ Approval date
- ✓ Approver name or role
- ✓ Any exception or condition
- ✓ Purchase order, where applicable

WHERE YOU MAY HAVE GAPS

- ☐ Approval happens by email, WhatsApp or verbal confirmation
- ☐ The quote and approval are stored separately
- ☐ Finance has to ask who approved the purchase
- ☐ The approver may not have seen the final quote
- ☐ Supporting documents are added after approval
- ☐ Approval status is tracked manually
- ☐ The business cannot easily show the decision trail

YOUR RATING

○ **Ready**
Green · 0–1 gaps

○ **Needs improvement**
Amber · 2–3 gaps

○ **High risk**
Red · 4+ gaps

RECOMMENDED IMPROVEMENT

Keep the approval connected to the supplier quote and supporting documents. This gives procurement and finance a clearer record when the purchase moves to PO, invoice and payment stages.

8

QUESTION 8

Can finance access the quotation trail when the invoice arrives?

Finance may not own supplier quotation management, but finance often needs the quotation trail later. When the invoice arrives, finance may need to check whether the invoice amount matches what was agreed and whether the purchase was properly supported.

WHAT GOOD LOOKS LIKE

- ✓ The selected supplier
- ✓ The approved quote
- ✓ The approval decision
- ✓ The purchase order, where applicable
- ✓ Supporting documents
- ✓ Any agreed price, scope or quantity
- ✓ Any known discrepancy or change
- ✓ The requester or department owner

WHERE YOU MAY HAVE GAPS

- ☐ Finance searches emails or asks procurement for the quote
- ☐ The approved quote is hard to locate
- ☐ Invoice amounts are checked manually against attachments
- ☐ Purchase order references are missing or inconsistent
- ☐ Supporting documents are stored in different places
- ☐ Finance only sees the quotation after the invoice arrives
- ☐ Invoice checking depends on one person's knowledge

YOUR RATING

○ **Ready**
Green · 0–1 gaps

○ **Needs improvement**
Amber · 2–3 gaps

○ **High risk**
Red · 4+ gaps

RECOMMENDED IMPROVEMENT

Make the quotation trail accessible before invoice checking begins. This helps finance work with procurement from the same purchasing record instead of rebuilding the decision after the invoice arrives.

9

QUESTION 9

Can the business review supplier decisions later?

Supplier quote records should help the business learn over time. If quotation history is not captured, the organisation loses useful procurement knowledge.

WHAT GOOD LOOKS LIKE

- ✓ Which suppliers were considered
- ✓ Which suppliers were selected
- ✓ How often certain suppliers are used
- ✓ Why suppliers were chosen
- ✓ Whether pricing changed over time
- ✓ Whether delivery or service issues occurred
- ✓ Whether supplier performance affected future decisions
- ✓ Whether departments are following a consistent process

WHERE YOU MAY HAVE GAPS

- ☐ Quote history is stored in individual inboxes
- ☐ Past supplier decisions are difficult to review
- ☐ Supplier selection depends on personal memory
- ☐ Procurement cannot easily compare past pricing
- ☐ Leadership has limited visibility over supplier choices
- ☐ Supplier issues are not connected to future decisions
- ☐ New staff cannot understand past purchasing decisions

YOUR RATING

○ **Ready**
Green · 0–1 gaps

○ **Needs improvement**
Amber · 2–3 gaps

○ **High risk**
Red · 4+ gaps

RECOMMENDED IMPROVEMENT

Keep quotation history in a way that supports future decisions. Supplier selection should become organisational knowledge, not just individual memory.

10

QUESTION 10

Is the quotation process practical enough for teams to follow?

A quotation process only works if teams actually use it. If the process is too slow, unclear or difficult, people will find workarounds.

WHAT GOOD LOOKS LIKE

- ✓ Clear enough for requesters to follow
- ✓ Practical for procurement teams
- ✓ Useful for approvers
- ✓ Helpful for finance
- ✓ Scaled to the value or risk of the purchase
- ✓ Not overly complicated for simple purchases
- ✓ Structured enough for important purchases
- ✓ Easy to review when questions arise

WHERE YOU MAY HAVE GAPS

- ☐ Teams bypass procurement because the process feels slow
- ☐ Supplier quotes are requested without clear guidance
- ☐ Approvals are chased manually
- ☐ Supporting documents are submitted late
- ☐ Different departments follow different practices
- ☐ People rely on personal relationships with suppliers
- ☐ The formal process feels harder than the workaround

YOUR RATING

○ **Ready**
Green · 0–1 gaps

○ **Needs improvement**
Amber · 2–3 gaps

○ **High risk**
Red · 4+ gaps

RECOMMENDED IMPROVEMENT

Design the quotation process so the right way is also the easiest way. The goal is not to make procurement heavier. The goal is to make supplier decisions clearer and easier to manage.

YOUR RESULT

Your supplier quote score

Count your ratings across the 10 questions.

Green — Ready

Amber — Needs improvement

Red — High risk

How to read your result

Mostly Green

Your supplier quotation process is relatively well controlled. Your next opportunity is to improve reporting, supplier performance review and visibility across departments, categories or recurring purchases.

Mostly Amber

Your process works, but it likely depends on manual effort. Your next step is to identify where teams spend the most time chasing, searching or clarifying supplier quote information.

Two or more Red

Your supplier quotation process may be creating avoidable delays, rework or control gaps. Review how your business requests quotes, compares suppliers, records approvals and stores supporting documents before the purchase moves to PO and invoice stages.

Quick priority matrix

Use your ratings to sequence the work. Fix the areas most likely to create delay and rework first, then improve and strengthen over time.

Fix first
If rated Red

- Final quote version control
- Approval linked to quote and supporting documents
- Finance access to the quotation trail
- Clear supplier comparison criteria

Improve next
If rated Amber

- Purchase need definition
- Supplier invitation records
- Recommendation quality
- Supplier decision review

Strengthen over time
Once the basics are in place

- Supplier performance review
- Category-level supplier comparison
- Preferred supplier governance
- Procurement reporting
- Connection between supplier decisions, POs and invoice records

What good looks like

A business with stronger supplier quote control should be able to say:

- ✓ We know what was requested before suppliers were asked to quote.
- ✓ We know which suppliers were invited.
- ✓ We know which suppliers responded.
- ✓ We can identify the final quote version.
- ✓ We compare supplier options using clear criteria.
- ✓ We record why a supplier was recommended.
- ✓ We link approval to the selected quote.
- ✓ Finance can access the supporting quotation trail.
- ✓ Supplier decision history is available for future review.
- ✓ The process is practical enough for teams to follow.

If your business cannot say this yet, supplier quotation control is a good place to improve procurement discipline.

How ADAM-Procure helps

ADAM-Procure helps growing organisations bring more structure to supplier quotation and procurement workflows.

> **Where it fits.** Instead of relying only on email threads, attachments, spreadsheets and manual follow-ups, teams can manage supplier quotation activity as part of a clearer procurement process.

ADAM-Procure supports teams by helping them:

- › Capture purchase needs more consistently
- › Manage supplier quotation or tender activities in a more structured way
- › Keep supplier submissions and supporting documents easier to access
- › Give approvers better context before making purchasing decisions
- › Link quotation activity to the wider procurement process
- › Improve visibility across requests, approvals, suppliers and purchase orders
- › Reduce reliance on individual inboxes and manual tracking

Procurement teams	Better control over supplier quotation activity.
Finance teams	Stronger supporting records when invoices need to be checked.
Operations teams	Fewer delays when supplier decisions are needed.
Leadership	Better visibility over how supplier choices are being made.

The goal is not to make procurement heavier.

Make supplier decisions clearer, faster and easier to manage.

Still managing supplier quotes through email threads, attachments and spreadsheets?

Use this checklist to review where your quotation process may need more structure. Review your supplier quotation workflow with ADAM-Procure.

https://adam-procure.com/contact-us/

This checklist describes good procurement practice for managing supplier quotations and is not tax, accounting or legal advice. For e-Invoice compliance, MyInvois submission and LHDN validation, consult your finance, tax or system teams. © Supplycart Technologies. ADAM-Procure.