

China Sourcing Project Brief Checklist

中国采购项目简报清单

Use this before supplier outreach or a Foshan visit. Record what is known, what is missing, and who must approve each decision. / 用于供应商询价或佛山考察之前，先分清已知、缺失信息及每个决策的确认人。

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01

Project identity

项目基本信息

Project reference / 项目编号	_____	Prepared by / 编制人	_____
Destination / 目的地	Country / city / address type	Target date / 目标日期	_____
Project type / 项目类型	Home / villa / hotel / office / retail / other	Decision owner / 决策人	_____
Current stage / 当前阶段	Planning / RFQ / samples / order / production	Local installer / 当地安装	Confirmed / TBC

02

Scope that must be clear

必须说清的采购范围

Check	Required input / 必需输入	What to record / 需记录内容
[]	Room or area list / 房间或区域清单	Every room, external area, quantity basis, and excluded scope.
[]	Categories / 品类	Cabinetry, doors/windows, tiles/stone, sanitary ware, lighting, furniture, soft furnishings, hardware.
[]	Drawings and BOQ / 图纸与 BOQ	Latest revision, file date, missing elevations/details, and who confirms final dimensions.
[]	Product references / 产品参考	Reference only, approved direction, approved sample, or confirmed specification.
[]	Quantity basis / 数量口径	Count, square metres, linear metres, sets, allowance, wastage, and spare-parts rule.
[]	Quality and finish / 质量与饰面	Material, colour, texture, hardware, glass, fabric, performance, and acceptable tolerance.
[]	Timeline / 时间	Sample date, drawing approval, deposit, production, QC, packing, loading, and destination handoff.
[]	Access and installation / 进场与安装	Lift, stairs, door openings, crane, storage, installer, power/water, local sequence, and site protection.

Boundary / 边界：Final site dimensions, structural decisions, local code, permits, certification, customs, tax, and licensed professional approvals remain with the responsible local parties unless a written project scope states otherwise. / 最终现场尺寸、结构决策、当地法规、许可、认证、清关税费及持牌专业审批，除非书面范围另有说明，仍由相当地责任方确认。

03 Quote and budget basis
报价与预算口径

Line / 项目	Record separately / 单独记录	Status / 状态
Product value / 产品货值	Currency, quantity, unit, material/finish, supplier, trade term, validity.	Confirmed / TBC
Design and sourcing / 设计与采购服务	Deliverables, workdays or fee basis, exclusions, and approval points.	Confirmed / TBC
Packing / 包装	Carton, crate, fumigation, fragile protection, labels, spare hardware.	Included / separate / TBC
China logistics / 中国内陆物流	Supplier pickup, warehouse, consolidation, loading, port handoff.	Included / separate / TBC
International freight / 国际运输	Mode, route, equipment, freight validity, insurance, surcharges.	Quote / TBC
Duty, tax, customs / 关税税费与清关	Destination broker and tax owner; do not guess from product price.	Local confirmation
Delivery and installation / 当地配送与安装	Unloading, access, storage, labour, equipment, commissioning, waste removal.	Local quote / TBC

04 Files to attach
建议附件

Priority	File / 资料	Minimum usable version / 最低可用版本
P0	Room list + product list / 房间与产品清单	One row per item; quantity, dimensions, image/reference, current status.
P0	Plans, elevations, details / 平面立面节点	Latest dated revision with a clear file name and revision owner.
P0	Destination and delivery condition / 目的地与配送条件	Country, city, postcode, address type, access notes, broker/forwarder if known.
P1	Current quotes / 现有报价	Original supplier file; keep product, packing, freight, tax and installation separate.
P1	Reference photos and samples / 参考图与样板	Label each as inspiration, requested, approved, rejected, or superseded.
P1	Local requirements / 当地要求	Written input from installer, engineer, architect, certifier, customs broker, or authority.

05 First decision gate
第一个决策节点

Route	Choose when / 何时选用	Next output / 下一个交付物
A. Remote sourcing / 远程采购	Scope is documented; supplier comparison can start without a visit.	Open-question list + comparable RFQ schedule.
B. Foshan visit / 佛山考察	Touch, comfort, colour, showroom range, or factory capability must be judged in person.	Appointment route + decision sheet + follow-up owners.
C. Local alternative / 当地采购	Order size, timeline, regulation, damage risk, or heavy installation makes China sourcing uneconomic.	Stop note + local items to source or verify.

Use / 用法：Share the completed brief with the buyer, sourcing coordinator, selected suppliers, forwarder, and relevant local professionals. Keep one current version and mark superseded files. / 将完成的简报共享给买方、采购协调人、已选供应商、货代及相关当地专业人士；只保留一份当前版本，旧版必须标记已替代。