

QUOTE DECLINE / LOST SALE RECORD

UK garage / dealer customer quotation and pre-order record template

Important: This template is a general business document for recording vehicle quotations, customer options, finance discussions, pricing decisions, deposits, extras and pre-order evidence. It is not legal, tax, accounting or financial advice. Have it checked by a qualified adviser for your exact business, finance permissions, consumer process and jurisdiction before relying on it.

| | | |
|--------------------------------|-------------------|---------------|
| Form reference / quote number: | Date: | Staff member: |
| Vehicle registration: | Customer / buyer: | Salesperson: |

Purpose

Used when a customer does not proceed.

Details to Record

| | |
|-------------------------------------|-------------------------------|
| Customer name: | Vehicle registration: |
| Quote number: | Date quote issued: |
| Follow-up completed? [] Yes [] No | Reason customer declined: |
| Price too high: | Finance declined: |
| Bought elsewhere: | Part-exchange value too low: |
| Changed mind: | Vehicle sold before decision: |
| Salesperson notes: | |

Notes / Supporting Evidence

Notes, supporting evidence, customer communications, quote references or follow-up action:

Signatures / Acceptance

| | |
|----------------------------------|-----------------------------|
| Staff member signature: _____ | Manager signature: _____ |
| Date: _____ | Time / reference: _____ |