Eleven-Step Cross-Border Sourcing Self-Check Checklist

ESTROUTE · Run through it before ordering and before shipment (version 1)

Post-mortems almost always trace back to a detail someone decided did not need writing down. Use this checklist once before ordering and once before shipment; the point is not to redo everything but to confirm that the documents that should exist do exist.

Step	Self-check question	Done
1 Requirement description	Are parameters, target price, quantity, certification and packaging all written down item by item	[ ]
2 Supplier verification	Does the licence cover production, is there a production-line video, can the quote be broken down into cost structure	[ ]
3 Quotation comparison	Are trade terms, packaging, payment and inspection responsibility unified	[ ]
4 Sample approval	Is a sealed sample kept, one copy per side, approved in writing	[ ]
5 MOQ and lead time	Is the lead time derived from real capacity, and is it written into the contract	[ ]
6 Contract clauses	Are specifications and acceptance criteria attached and signed	[ ]
7 Payment	Is the balance tied to the inspection result	[ ]
8 Production follow-up	Are there fixed points for progress feedback	[ ]
9 Inspection	Is it an AQL sampling inspection by a third party rather than factory selfies	[ ]
10 Logistics	Are shipping marks and packing lists split to match each consignee	[ ]
11 Clearance and arrival	Are documents complete, and does the category involve special compliance	[ ]

How to use it

It can be condensed into four checkpoints: before ordering (requirement sheet and contract annexes complete), during production (at least one progress confirmation), before shipment (inspection report and documents cross-checked) and on arrival (count, check and file retained samples). Once the templates are fixed, this routine no longer depends on individual experience.

Compiled by ESTROUTE for self-checks and supplier communication in cross-border sourcing. Tables may be freely copied, modified and passed along with the order. For a version tailored to your category, contact sales@orientalroute.com | estroute.com