TaggIQ

Promo Distributor Workflow Checklist

Request-to-payment worksheet for promo distributors

JOB NUMBER	CUSTOMER	DUE DATE

Step-by-step readiness

Step	Done?	Owner	Notes

Where promo jobs lose margin or status

Quote

setup, shipping, rush and decoration missed

Purchase order

PO sent before spec or artwork confirmed

Status

customer calls because status is not visible

Sign-off

COMPLETED BY	REVIEWED BY	DATE