Accessory Quotation

Audit Scorecard

A 15-point compliance assessment for item-wise pricing, package pricing, discount approval, tax accuracy, fitment charges, warranty terms, and quotation validity

Dealer / Center Name	
Dealer Code	
Region / Zone	
Auditor Name	
Audit Date	
Cycle / Period	

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How to Use This Scorecard

This scorecard evaluates Accessory Quotation compliance across 15 criteria grouped into 4 categories. For each criterion, circle a score from 1 (not in place) to 5 (fully embedded and sustained). Do not rate where you aspire to be — rate what you observe on the day.

Score Scale

Score	Level	What it means
1	**Not in place**	Standard does not exist or has never been implemented at this dealership.
2	**Attempted**	Some effort made but inconsistent — visible gaps remain in most areas.
3	**Defined**	Standard is documented and partially followed. Some areas compliant, others not.
4	**Managed**	Standard is followed consistently. Minor exceptions occur.
5	**Fully Sustained**	Fully embedded. Evidence of ongoing compliance between audits without prompting.

RAG Status Guide

Status	Overall Score	Action
Green	60–75 (80–100%)	Compliant. Maintain current standards.
Amber	38–59 (50–79%)	Improvement required. Structured action plan within 30 days.
Red	0–37 (0–49%)	Non-compliant. Priority intervention. Escalate to regional management.

AutoSmart Tip: Accessory quotation audits should cross-check a sample of recent quotations against the final invoices for the same customer. A systematic gap between quoted and invoiced amounts — in either direction — indicates either unauthorised discounting, pricing errors, or post-quote additions that were not properly consented to. Both are compliance and customer trust risks.

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Scorecard

Circle a score 1–5 for each criterion. Record observations in the Notes column.

No.	Criterion / Question	1	2	3	4	5	Notes
ITEM-WISE & PACKAGE PRICING							
1	Is every accessory quotation itemised — with each accessory listed separately by name, part number, and individual price — not quoted as a single bundled total?	○	○	○	○	○	
2	Where a package price is offered, is the saving versus individual item pricing clearly shown on the quotation, making the value proposition transparent to the customer?	○	○	○	○	○	
3	Is pricing on the quotation consistent with the current approved accessory price list, with no manual adjustments applied without proper documentation?	○	○	○	○	○	
4	Is the quotation format standardised — using a consistent template rather than ad hoc email or handwritten prices — ensuring all required fields are captured every time?	○	○	○	○	○	
DISCOUNT APPROVAL & TAX ACCURACY							
5	Is any discount applied to the quotation authorised by the appropriate management level before it is offered to the customer, not applied at the consultant's discretion?	○	○	○	○	○	
6	Is the discount amount and the authorising manager's name recorded on or attached to the quotation, creating a traceable approval record?	○	○	○	○	○	
7	Is the applicable tax (VAT or equivalent) calculated correctly on the quotation, applied to both the accessory price and the fitment charge separately where required?	○	○	○	○	○	
8	Is the pre-tax and post-tax total shown separately on the quotation, allowing the customer to clearly see the tax component of the total cost?	○	○	○	○	○	
FITMENT CHARGES & WARRANTY TERMS							
9	Is the fitment charge for each installed accessory shown as a separate line item on the quotation — not included in the accessory price without disclosure?	○	○	○	○	○	
10	Are the warranty terms for quoted accessories clearly stated on the quotation — covering duration, what is covered, and where warranty claims are submitted?	○	○	○	○	○	
11	Is the installation timeline (if not fitted at point of sale) included on the quotation, so the customer knows when to expect the accessory to be ready?	○	○	○	○	○	

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QUOTATION VALIDITY & GOVERNANCE							
12	Is a validity period stated on every accessory quotation, preventing customers from presenting outdated quotes after prices or promotions have changed?	○	○	○	○	○	
13	Is every quotation retained in the CRM or DMS, attached to the customer record, so a consistent price is honoured if the customer returns within the validity period?	○	○	○	○	○	
14	Is the customer's signed or digitally confirmed acceptance of the quotation required before any accessory is ordered or fitment is scheduled?	○	○	○	○	○	
15	Is accessory quotation accuracy reviewed periodically — comparing quoted prices against invoiced prices to identify systematic errors or unauthorised discounting?	○	○	○	○	○	
OVERALL SCORE → / 75 = %							

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Category Summary & RAG Status

Transfer category totals from the scorecard. Assign RAG status and record the priority action for each category.

Category	Score	%	RAG	Priority Action
Item-Wise & Package Pricing	/20			
Discount Approval & Tax Accuracy	/20			
Fitment Charges & Warranty Terms	/15			
Quotation Validity & Governance	/20			
OVERALL SCORE	**/75**			

Sign-Off

Auditor Name	
Auditor Signature	
Date	
Sales Manager Name	
Sales Manager Signature	
Next Audit Date	

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Action Plan Tracker

Accessory Quotation — Gap Closure Framework

A structured four-stage workflow to assign, track, verify, and close Accessory Quotation non-compliances

Dealer / Center Name	
Dealer Code	
Region / Zone	
Audit Cycle / Period	
Tracker Owner (ASM / ZSM)	
Date Opened	
Target Close Date	

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How to Use This Tracker

This tracker is designed to be completed immediately following a Accessory Quotation audit. Every non-compliance recorded must be logged here as an action item and progressed through all four stages before it is considered resolved.

Four-Stage Workflow

1. PENDING	2. IN PROGRESS	3. COMPLETED	4. APPROVED
Finding assigned. Owner & date set.	Work underway. Evidence being gathered.	Dealer submits evidence for review.	Auditor verifies and closes the item.

Stage Rules

Stage	Actioned by	Required action	Evidence required
PENDING	ASM / Auditor	Assign a named responsible party. Set a close date. Log the non-compliance description.	No evidence required at this stage.
IN PROGRESS	Accessory Quotation / Dealer Team	Begin remediation. Update status. Upload progress evidence as work is completed.	In-progress photos, supporting documents, records.
COMPLETED	Sales Manager	Mark item complete and submit for review. Evidence must be attached before submission.	Photo of rectified item, signed procedure, supporting evidence.
APPROVED	ASM / ZSM / Auditor	Review evidence. Verify compliance on next site visit if required. Approve and close.	Auditor sign-off. Date of verification recorded.

Tracker Summary

Fill in after completing each audit cycle.

Stage	Description	Count	Notes
PENDING	Not yet started		
IN PROGRESS	Work underway		
COMPLETED	Awaiting approval		
APPROVED	Verified & closed		

AutoSmart Tip: With AutoSmart Audit, every non-compliance is automatically converted into an action item at the point of audit — with owner assignment, close dates, evidence upload, and a four-stage approval workflow built in. No spreadsheets. No manual follow-up.

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Action Plan Tracker

Log every non-compliance from the audit below. Progress each item through all four stages before closure.

STAGE — PENDING						
Ref	**Non-Compliance / Gap Description**	**Category**	**Responsible Party**	**Target Date**	**Status**	**Evidence / Notes**
P-01						
P-02						
P-03						
P-04						
P-05						
P-06						
P-07						
P-08						
P-09						
P-10						

STAGE — IN PROGRESS						
Ref	**Non-Compliance / Gap Description**	**Category**	**Responsible Party**	**Target Date**	**Status**	**Evidence / Notes**
I-01						
I-02						
I-03						
I-04						
I-05						
I-06						
I-07						
I-08						

STAGE — COMPLETED						
Ref	**Non-Compliance / Gap Description**	**Category**	**Responsible Party**	**Target Date**	**Status**	**Evidence / Notes**
C-01						

C-02						
C-03						
C-04						
C-05						
C-06						

STAGE — APPROVED						
Ref	**Non-Compliance / Gap Description**	**Category**	**Responsible Party**	**Target Date**	**Status**	**Evidence / Notes**
A-01						
A-02						
A-03						
A-04						
A-05						
A-06						

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Cycle Sign-Off

To be completed once all action items in this cycle are Approved. Both the Sales Manager and the Regional Auditor must sign.

Dealer Principal Name	
Dealer Principal Signature	
Regional Auditor / ASM Name	
Auditor Signature	
Date of Review	
Next Review Date	

Cycle Notes

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