

TECHNICAL SUBMITTAL / PRE-QUALIFICATION CHECKLIST

Project and submission details | Required enclosures - Part 1

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Purpose: Use this form as a pre-submission completeness check. Mark an item Included or N/A and record the relevant datasheet page, certificate number or attachment reference.

1 DOCUMENT CONTROL

PROJECT TITLE

CLIENT / EMPLOYER

CONSULTANT

MAIN CONTRACTOR

SUBMITTAL REFERENCE

REVISION

DATE

SUBMISSION TYPE

☐

Material submittal

☐

Pre-qualification

☐

Alternative

☐

Resubmission

2 PRODUCT, MANUFACTURER AND SUPPLIER INFORMATION

PRODUCT / SYSTEM

MANUFACTURER

MODEL / PART NUMBER

COUNTRY OF ORIGIN

SUPPLIER / SUBCONTRACTOR

DISCIPLINE / SPECIFICATION SECTION

3 REQUIRED ENCLOSURES - PART 1

NO.	REQUIRED DOCUMENT / CHECK	INCL.	N/A	EVIDENCE / REMARKS
1	Cover letter or document transmittal identifying the project, package, product and submission purpose.	☐	☐	
2	Completed project material submittal or pre-qualification form, including revision and document index.	☐	☐	
3	Company profile, organization chart and relevant key-personnel details (when required for pre-qualification).	☐	☐	
4	Valid company registrations, trade licences and authority classifications (only as required by the project or jurisdiction).	☐	☐	
5	Manufacturer authorization, distributor appointment or agency letter (where applicable).	☐	☐	
6	Current technical datasheets and catalogue pages with the offered model clearly identified.	☐	☐	
7	Product schedule listing model numbers, ratings, selected options, accessories and quantities.	☐	☐	
8	Clause-by-clause compliance matrix against the project specification and applicable schedules.	☐	☐	

TECHNICAL SUBMITTAL / PRE-QUALIFICATION CHECKLIST

Required enclosures - Part 2 | Technical verification

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3 REQUIRED ENCLOSURES - PART 2

NO.	REQUIRED DOCUMENT / CHECK	INCL.	N/A	EVIDENCE / REMARKS
9	Clear deviation or exception statement; state "No deviations" when the offer is fully compliant.	☐	☐	
10	Relevant shop drawings, dimensional drawings, wiring diagrams, control schematics or interface details.	☐	☐	
11	Product samples, finish schedules, colour selections or mock-up details (where required).	☐	☐	
12	Certificates, listings and statutory approvals specifically required by the project, authority or specification.	☐	☐	
13	Independent test reports, performance certificates and declared ratings applicable to the offered model.	☐	☐	
14	Quality certificates and manufacturer quality-control documents requested by the project.	☐	☐	
15	Environmental, sustainability or material-health documentation (where specified).	☐	☐	
16	Health and safety information, risk-related product documentation or SDS (where applicable).	☐	☐	
17	Warranty statement confirming period, scope, exclusions and responsible issuing party.	☐	☐	
18	Installation, operation and maintenance manuals or method information appropriate to the submission stage.	☐	☐	
19	Reference-project list and performance history (when required for pre-qualification).	☐	☐	
20	Alternative-product justification covering technical differences, programme impact, cost impact and employer benefit (if applicable).	☐	☐	
21	Complete enclosure index with every attachment named, numbered and matched to the latest revision.	☐	☐	
22	Submission signed and stamped by the authorized parties where required by the project procedure.	☐	☐	

4 TECHNICAL VERIFICATION BEFORE SUBMISSION

- ☐ Exact offered model identified
- ☐ Accessories and options included
- ☐ Dimensions and installation clearances checked
- ☐ Required standards supported by evidence
- ☐ Ratings match the requirement
- ☐ Connections and interfaces checked
- ☐ Power supply and control signals verified
- ☐ All documents are current and consistently revised

EXCEPTIONS, CLARIFICATIONS OR MISSING DOCUMENTS

Review note: Resolve missing evidence and document every deviation before the package is released for formal submission.

TECHNICAL SUBMITTAL / PRE-QUALIFICATION CHECKLIST

Alternative-product assessment | Submission authorization

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ALTERNATIVE-PRODUCT ASSESSMENT - COMPLETE ONLY WHEN APPLICABLE

SPECIFIED PRODUCT / BASIS OF DESIGN

PROPOSED ALTERNATIVE PRODUCT

SPECIFIED MANUFACTURER / MODEL

ALTERNATIVE MANUFACTURER / MODEL

☐ Technical performance and compliance comparison attached☐ Code, listing and authority-approval implications reviewed☐ Commercial or cost impact stated☐ Dimensions, interfaces and coordination impacts reviewed☐ Lead-time and programme impact stated☐ Warranty, support and spare-parts implications stated

REASON FOR PROPOSING THE ALTERNATIVE

TECHNICAL DIFFERENCES, LIMITATIONS AND PROPOSED MITIGATION

PROGRAMME, COMMERCIAL AND EMPLOYER BENEFIT STATEMENT

6

SUBMISSION AUTHORIZATION

PREPARED BY

NAME / TITLE

SIGNATURE / STAMP AND DATE

TECHNICAL / QA-QC REVIEW

NAME / TITLE

SIGNATURE / STAMP AND DATE

AUTHORIZED CONTRACTOR SUBMISSION

NAME / TITLE

SIGNATURE / STAMP AND DATE

Use note: This template is intentionally region-neutral. Delete, add or mark items N/A to match the contract, consultant procedure, applicable codes and local-authority requirements. Do not claim compliance without traceable technical evidence.