Custom Tooling Checklist for China Orders

Use before authorizing tooling payment. Define the asset, contractual ownership, custody, permitted use, technical files, changes, transfer and acceptance evidence. This is not a legal contract or legal opinion.

A. Tooling scope

Checklist item	Evidence / what to confirm	Status	Buyer notes
[ ] Is the charge for a complete new tool, a partial tool, an insert, a fixture or engineering work?	Quotation / scope of work	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Is the tooling newly manufactured or based on an existing standard tool?	Tooling description and supplier confirmation	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Which components are included: mold base, cavities, inserts, hot runner, spare parts, gauges or fixtures?	Itemized component list	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Is the tooling dedicated to my product or shared with other products?	Usage and product allocation statement	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Are design, engineering, testing, trial production and modifications included in the quoted fee?	Quotation exclusions and deliverables	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Are maintenance, repair, storage and future replacement costs included or charged separately?	Cost responsibility and fee schedule	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Is the tooling fee itemized separately from unit price and other development costs?	Itemized quotation	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	

B. Ownership

Checklist item	Evidence / what to confirm	Status	Buyer notes
[ ] Does the agreement explicitly identify who owns each tool?	Signed agreement / tooling schedule	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Is the ownership transfer event defined?	Transfer milestone or contractual trigger	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	

Checklist item	Evidence / what to confirm	Status	Buyer notes
[ ] If ownership depends on full payment, is the payment condition clear?	Payment and title clause	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] If tooling is amortized, is ownership before and after the volume threshold defined?	Amortization and threshold terms	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Are any supplier retention, lien or unpaid-cost claims addressed?	Terms under the governing law	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Does the tooling agreement identify the exact legal entity responsible for the tooling?	Legal entity details	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] If a separate mold shop builds or holds the tool, is its role and responsibility documented?	Mold-shop acknowledgment / agreement	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	

C. Identification

Checklist item	Evidence / what to confirm	Status	Buyer notes
[ ] Does each tool have a unique asset or mold number?	Asset register / physical marking	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Is the tool linked to a specific product, SKU and revision?	Product and revision record	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Are the mold base, cavities, inserts, hot-runner parts and spare components listed?	Component inventory	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Are the tooling manufacturer and current custodian identified?	Asset record and custodian confirmation	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Is the physical storage location recorded?	Factory and site address	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Are dated photographs available?	Dated photo record	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] If agreed, is the tool physically marked as buyer-owned or assigned to the buyer's asset number?	Photographic and inspection evidence	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	

Checklist item	Evidence / what to confirm	Status	Buyer notes
[ ] Are the tooling drawings and asset register consistent with the physical tool?	Drawing / register reconciliation	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	

D1. Storage

Checklist item	Evidence / what to confirm	Status	Buyer notes
[ ] Which factory and exact site will store the tool?	Custodian and storage address	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Who is responsible for storage and physical security?	Responsibility assignment	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Is storage included in the tooling fee or charged separately?	Commercial terms	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Is there a free storage period or a recurring storage fee?	Storage duration and fee terms	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] What preservation procedures are required during periods without production?	Preservation procedure	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Is the buyer allowed to inspect the tool or request an inventory?	Access and inventory rights	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Who is responsible for loss, theft or damage while the tool is in custody?	Risk allocation clause	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Is insurance required, and who arranges and pays for it?	Insurance requirement and responsibility	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	

D2. Maintenance

Checklist item	Evidence / what to confirm	Status	Buyer notes
[ ] Who performs routine maintenance?	Named party / service scope	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	

Checklist item	Evidence / what to confirm	Status	Buyer notes
[ ] Which maintenance activities are included in the agreed fee?	Maintenance scope	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] What maintenance activities require additional approval or payment?	Approval and cost triggers	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Are cleaning, lubrication, corrosion prevention and preservation procedures defined where relevant?	Tool-specific maintenance procedure	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Is tool usage or cycle count recorded where applicable?	Usage / cycle log	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Are wear, repairs and replacement components logged?	Maintenance and repair records	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Does the supplier provide maintenance records when requested?	Reporting obligation	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Who pays for damage caused by improper storage or operation?	Damage responsibility clause	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	

E. Usage rights

Checklist item	Evidence / what to confirm	Status	Buyer notes
[ ] Is the tool restricted to producing the buyer's specified products?	Permitted-use clause	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Can the supplier use the tool for other customers?	Third-party use terms	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Can the supplier use it for similar or derivative products?	Derivative-product restriction	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Can the supplier transfer it to an affiliate or subcontractor?	Transfer / subcontracting permission	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Is prior written approval required before moving the tool to another site?	Site-move approval requirement	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	

Checklist item	Evidence / what to confirm	Status	Buyer notes
[ ] Are unauthorized copying, production or sale of products made with the tool addressed?	IP / misuse controls	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Are photographs, product displays and online listings subject to agreed restrictions?	Marketing and disclosure terms	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Are there exceptions for shared standard components or jointly funded tooling?	Shared-tooling carve-outs	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	

F. Design files

Checklist item	Evidence / what to confirm	Status	Buyer notes
[ ] Are 2D engineering drawings included?	File list and delivery record	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Are 3D CAD files included?	File list and delivery record	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Are editable / native files included where required?	Native-file requirement	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Are neutral exchange formats agreed where appropriate?	Agreed file formats	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Are mold or tooling design drawings included?	Tooling drawing deliverables	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Are electrode data, tooling component drawings or other relevant technical files included?	Technical file list	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Are revision histories and final approved versions provided?	Revision history and final package	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Who owns the product design and who owns the tooling design?	Ownership / license allocation	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Does the buyer have the right to use, modify or provide the files to another manufacturer?	Use, modification and transfer license	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	

Checklist item	Evidence / what to confirm	Status	Buyer notes
[ ] Are confidentiality and permitted-disclosure requirements defined?	NDA / disclosure restrictions	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	

G. Modification

Checklist item	Evidence / what to confirm	Status	Buyer notes
[ ] Is routine maintenance distinguished from repair and design modification?	Service classification	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Must the supplier provide a written description and quotation before material modifications?	Change quotation procedure	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Who approves modification scope and cost?	Approval authority	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Who owns new inserts, cavities or replacement components?	Component ownership terms	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Are removed or replaced components retained or returned?	Disposition record	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Are revised drawings and CAD files delivered after approved changes?	Updated technical package	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Is the tooling asset register updated?	Updated asset register	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Does a material change require a new sample or production validation?	Validation trigger	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Are changes to tool geometry, cooling, surface finish or other critical features subject to written approval?	Written change approval	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	

H. Transfer

Checklist item	Evidence / what to confirm	Status	Buyer notes
[ ] Does the buyer have a documented right to request transfer or return?	Transfer / return clause	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Which events allow transfer: termination, production discontinuation, breach or buyer request?	Transfer triggers	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] How much advance notice is required?	Notice period	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Who is responsible for dismantling and preparing the tool?	Handover responsibility	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Who pays dismantling, packing, freight, insurance and handling costs?	Transfer cost allocation	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Are any potentially applicable unpaid-cost, lien or retention claims addressed under the governing law?	Governing-law review	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Is the tool's condition documented before dispatch?	Condition report and photographs	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Are loose inserts, spare parts, gauges and accessories included?	Handover inventory	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Are CAD files, drawings, maintenance records and process documents handed over?	Handover document package	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Are export, transport and receiving-factory requirements identified?	Transport and receiving requirements	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Is a receiving inspection or requalification required before production resumes?	Receiving inspection / validation plan	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	

I. Payment and acceptance

Checklist item	Evidence / what to confirm	Status	Buyer notes
[ ] Design approval milestone is linked to approved tooling drawings and specifications.	Approved drawings / specifications	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	

Checklist item	Evidence / what to confirm	Status	Buyer notes
[ ] Tooling construction progress milestone is linked to a progress report and agreed production evidence.	Progress report / production evidence	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] First trial / T0 milestone is linked to a trial record and initial sample.	T0 record and sample	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Revised trial / T1 milestone is linked to an updated sample and revision record.	T1 sample and revision record	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Final tooling acceptance milestone is linked to an approved sample and agreed acceptance criteria.	Acceptance record	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Final payment is linked to completion of agreed deliverables and documentation.	Completion package	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] If tooling is amortized, total tooling value, amount per unit, threshold and cumulative quantity are documented.	Amortization schedule	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Ownership before and after the volume threshold is documented.	Ownership threshold terms	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
[ ] Early termination and buyout treatment is documented.	Exit / buyout terms	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	

Final payment reminder: Ownership, custody, permitted use, design files, transfer rights and legal enforceability are separate questions. Review the actual documents and applicable law before making a material payment or commitment.

Final Custom Tooling Checklist

Area	Required confirmation	Status	Evidence / notes
Tooling scope	Complete tool, components and engineering deliverables are identified.	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
Ownership	Legal owner and intended transfer event are documented.	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
Contracting entity	Correct legal entity and responsible parties are identified.	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
Identification	Tool ID, product, revision, components and location are recorded.	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
Storage	Custodian, location, fees and preservation responsibilities are defined.	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
Maintenance	Routine care, repair, records and cost responsibilities are defined.	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
Usage rights	Permitted use and restrictions are documented.	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
Design files	File deliverables, ownership or license and access rights are clear.	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
Modification	Approval, cost, revised records and component ownership are defined.	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
Transfer	Release, dismantling, packing, costs and handover documents are defined.	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
Payment	Payment milestones and acceptance evidence are aligned.	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	
Legal review	Material ownership, IP and enforcement terms have been reviewed where necessary.	[ ] Locked [ ] Needs confirmation [ ] Requires re-approval [ ] N/A	