

1 CUSTOMER / PROJECT DETAILS

Customer / company	Date
Contact person / telephone / email	Project / enquiry reference
Site / plant / department	Application / equipment tag
Required trial / delivery date	Existing / preferred Safic product or range

2 CHEMICAL CATEGORY & OBJECTIVE

Category	Cleaner	Degreaser	Descaler	Rust remover	Water treatment	Metalworking
	Corrosion inhibitor	Sanitiser	Biocide	Flocculant	Defoamer	Floor / hygiene
						Other
Problem to solve / desired chemical function	Required result / measurable performance target					
Current product / supplier / grade	Reason for changing / current shortcomings					
New application / replacement / cost reduction / compliance	Criticality / consequence of poor performance					

3 APPLICATION & PROCESS DESCRIPTION



Capture the current product, required result, operating window, compatibility constraints and measurable acceptance criteria.

Method	Manual	Spray	Immersion	Circulation	CIP	Dosing	Foam	Wipe	Other
Process / equipment description	Batch / continuous / once-off / maintenance								
System volume / tank or equipment capacity	Treatment frequency / operating hours / annual demand								
Application temperature range (°C)	Contact time / residence time / cycle length								
Current dosage / concentration / dilution	Mixing, agitation, pressure or flow conditions								
Available water: potable / softened / demin / process	Water hardness / conductivity / chlorides / analysis								
Process notes / sequence / restrictions									

4 SUBSTRATE, MATERIALS & COMPATIBILITY

Contact materials

Carbon steel

Stainless

Aluminium

Copper / brass

Galvanized

Other

Concrete

Glass

Ceramic

Rubber / seals

Plastics

Paint / coating

Food surface

Exact material grades / coatings / elastomers

Components that must not be attacked, stained or swollen

Compatibility test / coupon trial required

Maximum acceptable corrosion / weight loss / appearance

Temperature, pressure or immersion duration

Previous incompatibility / damage / failure evidence

5 SOIL, DEPOSIT, MEDIA OR CONTAMINANT

Type

Oil

Grease

Scale

Rust

Carbon

Polymer

Biofilm

Mineral

Organic

Contaminant / deposit identity and composition

Thickness / quantity / hardness / adhesion

Process fluid / chemical name / concentration / pH

Temperature / age / source of contamination

Desired end point: clean / dissolve / separate / inhibit

Materials or product that must remain unaffected

6 REQUIRED CHEMICAL & PHYSICAL PROPERTIES

Preferred pH range / acid / alkaline / neutral

Liquid / powder / gel / foam / aerosol

Viscosity / density / colour / odour limitation

Solubility / rinsability / residue / low-foam requirement

Flash point / VOC / non-flammable requirement

Biodegradability / phosphate / chloride / solvent limits

Concentrate or ready-to-use / dilution range

Shelf life / freeze-thaw / storage-temperature range

Food grade / potable water / pharmaceutical / cosmetic

Other prohibited substances / formulation constraints

7 OPERATING WINDOW & PERFORMANCE CRITERIA

Minimum / normal / maximum dose or concentration

Minimum / normal / maximum temperature

Required contact time / throughput / cleaning rate

Target pH / conductivity / turbidity / residual

Acceptance test / analytical method / specification

Trial sample size / success criteria / comparison baseline

Compatibility and performance notes

8 SAFETY, EXPOSURE & HANDLING

Constraints	Non-toxic	Non-flammable	Low odour	Non-corrosive	No respirator	Other
Operator exposure / application ventilation				Required PPE / occupational exposure limit		
Confined space / hot surface / ignition sources				Spill containment / emergency response / first aid		
Storage class / segregation / maximum site inventory				Compatibility with tanks, pumps, hoses and dispensing		
Hazard classification / UN number / transport class				SDS language / emergency contact requirements		

9 ENVIRONMENTAL & WASTEWATER REQUIREMENTS

Discharge route / effluent-treatment system	Permitted pH / COD / BOD / metals / oil / toxicity limits
Neutralisation / separation / recovery requirement	Waste classification / disposal contractor
Water-use reduction / reuse / rinse-water limits	Environmental approval / customer sustainability target

10 QUALITY, REGULATORY & DOCUMENTATION

Required	SDS	TDS	COA	COC	REACH / SVHC	Food approval	Potable water	Other
Product specification / purity / active content					Batch traceability / expiry / retained sample			
Applicable SANS / ISO / ASTM / client standard					Halal / Kosher / NSF / FDA / other approval			
Change notification / formulation consistency					Supplier quality certification / audit requirement			

11 PACKAGING, CONSUMPTION & LOGISTICS

Trial / order / monthly / annual quantity	Pack size: bottle / drum / IBC / bulk tanker
Delivery location / unloading and handling facilities	Returnable container / pallet / labelling requirements
Minimum order / lead time / stockholding requirement	Target cost per litre, kilogram or treated unit

12 TRIAL, RECOMMENDATION & APPROVAL

Laboratory / site trial procedure and owner	Before-and-after measurements / sample retention
Customer approval / MOC / EHS sign-off	Training, dosing equipment and technical support

13 RECOMMENDED PRODUCT, NOTES & ATTACHMENTS

Recommendation / use conditions / exclusions / SDS, photograph and analysis references