



0% Business Loans

How to tick all the boxes



It really pays to get the paperwork right first time

To support an application for a 0% business loan, we need four documents from the equipment supplier (on the supplier's own stationery):

- A quotation
 - An invoice
 - A commissioning certificate
- to be submitted with the loan application.
- Once the application has been approved, the customer will need to submit these in order to access their loan funds.

The sooner we receive the correct documentation, the sooner the customer can access their loan. Provided all required details are included, we can start making loan payments to the customer by BACS within 10 working days of receiving the invoice. If any information is missing, this could delay the payments.

To illustrate what pieces of information we need from the supplier, we have laid out a set of dummy documents on the following pages.

For more information on the loans scheme application process visit www.carbontrust.com or call our **Loans Team on 028 9073 4398**

Quotation

Does the quotation include the following?

CHECKLIST

- ☐ 1. The customer's registered name and address (as it appears in the online application)
- ☐ 2. The VAT amount and the supplier's VAT registered number, or confirmation that they are not VAT registered
- ☐ 3. The equipment supplier's quote reference
- ☐ 4. The quote must be dated within the past 3 months
- ☐ 5. A full list of the equipment to be supplied including quantities and price
- ☐ 6. The equipment supplier's name, address and contact number as stated on the Application

SAMPLE SUPPLIER LTD

QUOTATION SAMPLE

Sample Company Ltd, 11 The Street, New Town, County NT1 2CY

1 Company Customer Ltd
1 The Road
The Park
Town AB1 2CD

Tel: 01234 567890
Fax: 01234 567891

Our VAT Reg. No: 012 3456 78

Quotation Ref: 1A 234

Date: 30 January 2013

QUOTATION

To deliver, install and commission the following items:

5 Sample's SAM1234 Heater Packaged System	£50,000
Flue (10m)	£5,000
Heat Distribution and Summer Heat Dump	£5,000
Delivery	£2,000
Installation and Commissioning	£10,000
TOTAL	£72,000
2 VAT @ 20%	£14,400
TOTAL Amount Due	£86,400

Payment Terms

30% deposit with order, 60% upon delivery and 10% on commissioning.

The above price is subject to VAT.

This quotation is only valid for 30 days.

Delivery Times

3 weeks from receipt of deposit payment.

6 SAMPLE COMPANY LTD, 11 The Street, New Town, County NT1 2CY Telephone: 01234 567890 Fax: 01234 567891 email: sales@sampleltd.co.uk
Registered Company No. 01234567 Vat Registered No: 012 3456 78

Invoice

Does the invoice include the following?

☒ CHECKLIST

- ☐ 1. The customer's registered name and address (as it appears in the online application)
- ☐ 2. The VAT amount and the supplier's VAT registered number, or confirmation that they are not VAT registered
- ☐ 3. A supplier quote reference which matches the original quotation
- ☐ 4. An invoice date
- ☐ 5. An invoice number
- ☐ 6. A full list of the equipment to be supplied
- ☐ 7. The equipment supplier's name and address as stated on the Application and Loan Agreement

Please note the invoice can either be a deposit invoice for 30% of the project cost, or the full invoice for 100% of the project cost.

SAMPLE SUPPLIER LTD

INVOICE SAMPLE

Sample Company Ltd, 11 The Street, New Town, County NT1 2CY

Company Customer Ltd
1 The Road
The Park
Town AB1 2CD

Tel: 01234 567890
Fax: 01234 567891

Customer No: 0567 01

Our VAT Reg. No: 012 3456 78

Quotation Ref: 1A 234

Date: 30 January 2013

INVOICE

Invoice No: 1A 234

Purchase Order: PO167896

Sample's SAM1234 Heater Packaged System
Flue (10m)
Heat Distribution and Summer Heat Dump
Delivery
Installation and Commissioning

£50,000
£5,000
£5,000
£2,000
£10,000

TOTAL

£72,000

VAT @ 20%

£14,400

TOTAL Amount Due

£86,400

Payment

30% with order.
Payment is due now.
Please make payment to:
Remit to: Sample Ltd
The Bank, London
Sort Code: 01-02-03
Account No: 01234567

Payment Terms:

30 days.

SAMPLE COMPANY LTD, 11 The Street, New Town, County NT1 2CY Telephone: 01234 567890 Fax: 01234 567891 email: sales@sampleltd.co.uk
Registered Company No. 01234567 Vat Registered No: 012 3456 78

Commissioning Certificate

Does the commissioning certificate include the following?

☒ CHECKLIST

SAMPLE SUPPLIER LTD

COMMISSIONING SAMPLE

CERTIFICATE OF COMMISSIONING

Certificate No: UK 2009-01-30/789

1

Company Customer Ltd
1 The Road
The Park
Town AB1 2CD

Customer No: 0567 01

Tel: 01234 567890
Fax: 01234 567891

Date: 30 January 2013

2

3

Description	Serial Number	Model
Sample's SAM1234 Heater Packaged System	123456	SAM1234
Flue (10m)	N/A	F10m
Heat Distribution and Summer Heat Dump	697HD	SAM58

The above equipment has been installed and commissioned in accordance to the manufacturer's specification on the date found below.

4

Site Address _____

5

Engineer's Signature: _____
Engineer's Name (Print): _____
Date: _____

6

Customer's Signature: _____
Customer's Name (Print): _____
Date: _____

7

SAMPLE COMPANY LTD, 11 The Street, New Town, County NT1 2CY Telephone: 01234 567890 Fax: 01234 567891 email: sales@sampleltd.co.uk
Registered Company No. 01234567 Vat Registered No: 012 3456 78

- ☐ 1. The customer's registered name and address (as it appears in the online application)
- ☐ 2. Date of installation
- ☐ 3. A full list of the equipment installed, which matches the original quotation
- ☐ 4. The site address where the equipment was installed
- ☐ 5. The installation engineer's printed name and signature
- ☐ 6. The customer's printed name and signature, on behalf of their company
- ☐ 7. The equipment supplier's name and address as stated on the Application and Loan Agreement

The Carbon Trust is an independent company with a mission to accelerate the move to a sustainable, low carbon economy. The Carbon Trust:

- ▶ Advises businesses, governments and the public sector on opportunities in a sustainable, low carbon world.
- ▶ Measures and certifies the environmental footprint of organisations, products and services.
- ▶ Helps develop and deploy low carbon technologies and solutions, from energy efficiency to renewable power.

For more information call
028 9073 4398
or visit www.carbontrust.com

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