



# **SUPPLIER DOCUMENTATION GETTING IT RIGHT FIRST TIME**

Sample documentation for the Green  
Business Fund Capital Contribution  
Scheme



## IT PAYS TO GET THE PAPERWORK RIGHT FIRST TIME

To support an application for a capital contribution from the Green Business Fund, we need three documents from the equipment supplier on their company letterhead:

- Quotation ] to be submitted with the capital contribution application
- Invoice ] to be submitted after project completion to draw down
- Commissioning Certificate ] offered funding

These documents need to contain specific information in order to be accepted. The next 3 pages contain sample documents to assist you.

Documentation submitted in the correct format enables us to process the application, and then disburse offered funding quickly.

Providing all required details are included, we can release the capital contribution to the customer by BACS within 10 working days of receiving the invoice and commissioning certificate. If any information is missing, it may delay payment.

FOR ASSISTANCE CALL THE GREEN BUSINESS  
FINANCE TEAM ON **028 9073 4398** OR EMAIL  
**GREENBUSINESSFUND@CARBONTRUST.COM**

# QUOTATION

## Does the quotation include the following?

## Checklist

**SAMPLE SUPPLIER LTD**

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

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Company Customer Ltd  
The Park  
Town  
AB1 2CD

Tel: 01234 567890  
Fax: 01234 567891

Installation address

Our VAT Reg No: 012 3456 78

Quotation Ref : 1A 234

Date : 24th June 2018

**QUOTATION**

To deliver, install and commission the following

<u>Quantity</u>	<u>Equipment type</u>	
1 x	SAM1234 Heater Packaged System	£50,000.00
	Flue (10m)	£ 5,000.00
1 x	Heat Distribution and Summer Heat Dump	£ 5,000.00
	Delivery	£ 2,000.00
	Installation and Commissioning	£10,000.00
Net amount		£72,000.00
VAT at 20%		£14,400.00
Total Amount Due		£86,400.00

**Payment Terms**  
30 days from date of invoice

The above price is subject to VAT at the prevailing rate  
This quotation is valid for 30 days

**Delivery Terms**  
3 weeks from receipt of order

SAMPLE COMPANY LTD, 11 The Street, New Town, County NT1 2CY  
Telephone: 01234 567890 Fax: 01234 567891 email: [sales@sampleltd.co.uk](mailto: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. Installation address
- 3. Supplier's VAT registered number, or confirmation that they are not VAT registered
- 4. Clear break out of VAT amount
- 5. The supplier's quote reference
- 6. The quote must be dated within 3 months
- 7. Validity of quote
- 8. A full list of the equipment to be supplied including quantities and price
- 9. The equipment supplier's name, address and contact number as stated on the application

# INVOICE

## Does the invoice include the following?

## Checklist

**SAMPLE SUPPLIER LTD**

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

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<b>1</b> Company Customer Ltd The Park Town AB1 2CD	<b>2</b> Installation address	Customer No: 0567 01
Tel: 01234 567890		Our VAT Reg No: 012 3456 78
Fax: 01234 567891		Quotation Ref : 1A 234
		Date : 24th June 2018
<b>6</b> Invoice No : 1A 234		<b>3</b> Purchase Order : P0167896

**INVOICE**

<u>Quantity</u>	<u>Equipment type</u>	
<b>7</b> 1 x	SAM1234 Heater Packaged System	£50,000.00
	Flue (10m)	£ 5,000.00
1 x	Heat Distribution and Summer Heat Dump	£ 5,000.00
	Delivery	£ 2,000.00
	Installation and Commissioning	£10,000.00
		£72,000.00
<b>3</b> Net amount		VAT at 20%
		£14,400.00
Total Amount Due		£86,400.00

Please make payment to Sample Ltd  
The Bank, London  
Sort Code 01-02-03  
Account No : 01234567

**Payment Terms**  
30 days from date of invoice

**8** SAMPLE COMPANY LTD, 11 The Street, New Town, County NT1 2CY  
Telephone: 01234 567890 Fax: 01234 567891 email: [sales@sampleltd.co.uk](mailto: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.** Installation address
- 3.** Supplier's VAT registered number, or confirmation that they are not VAT registered
- 4.** The supplier's quote reference which matches the original quotation
- 5.** An invoice date
- 6.** An invoice number
- 7.** A full list of the equipment supplied and the cost
- 8.** The equipment supplier's name and address as stated on the application and capital contribution agreement

\*note please provide a reason for any difference between quote + invoice

# COMMISSIONING CERTIFICATE

Does the commissioning certificate include the following?

## Checklist

**SAMPLE SUPPLIER LTD**

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**CERTIFICATE OF COMMISSIONING**  
Certificate No : UK 2016-05-31/789

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

Tel: 01234 567890  
Fax: 01234 567891

Customer No: 0567 01

Date : 30th June 2018

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](mailto: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 supplied, which matches the original quotation
- 4.** The site address where the equipment was installed
- 5.** The installation engineer's printed name, signature and date
- 6.** The customer representative's printed name, signature and date
- 7.** The equipment supplier's name and address as stated on the application and capital contribution agreement



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[GreenBusinessFund@carbontrust.com](mailto:GreenBusinessFund@carbontrust.com)

#GreenBusinessFund