**Document Version Control**

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| **Version** | **Date** | **Author**  | **Rationale** |
| 1.0 | 19/06/2015 |  MC | Version control introduced to Guidance & Model Documents. |
| 1.1 | 17/12/2020 | VG | Very small change to add Company registration and VAT numbers. |
| 2.0 | 5/04/2022 | CM | Re-draft and simplified to remove reference to RHI incorporate all relevant content from Covering Letter.  |

**Solar Thermal**

**Model Quotation and Order Form**

**Guidance to RECC installer members in shaded boxes. Remove these before use.**

**Important Note to installers:** all RECC members have an obligation to make sure that they comply with the *Consumer Contracts (Information, Cancellation and Additional Charges Regulations (2013)*, where applicable. Those regulations apply when a consumer is asked to sign a contract during a sales visit to their home, elsewhere or away from the Code member’s trade premises in the presence of a representative of the Code member. Under these circumstances the sale is defined as an *‘off-premises contract’*. For more information on those regulations see *Guidance on the Consumer Contract Regulations 2013* here: <https://www.recc.org.uk/member/documents> **Please note:** If the regulations apply to your sales practice, then you must follow all instructions for ‘off-premises contracts’ in this document (indicated as **‘Note For Home Sellers’**) or make sure your pre-contractual information complies with the law in some other way.

**Note for Home Sellers:** While every attempt has been made to make this quote document compatible with the *Consumer Contracts (Information, Cancellation and Additional Charges) Regulations 2013*, all RECC members have an obligation to ensure their own compliance.

Dear [Name],

Thank you for asking [insert your company name here] to provide you with a proposal for a solar thermal microgeneration system. We have pleasure in enclosing our proposal for the work. This document includes your quote and order form and we have also provided:

* an estimate of the performance you can expect to get – this is based on a survey of your property,
* our terms of business, and;
* a cancellation form in case you change your mind.

We have also set out some key points you need to be aware of should you decide to go ahead.

[insert your company name here] is a member of the Renewable Energy Consumer Code, member no. [insert RECC membership no. here]. A leaflet describing the Code is included with this proposal. You can see the full code here: <http://www.recc.org.uk/scheme/consumer-code>

This quote and other items listed above make up our proposal. Once you’ve had a chance to look through the documents, if you wish to proceed, please complete the **Order Form** below and return it to [insert your company details] together with your deposit payment [delete if not applicable].

[Insert Company Name and address[[1]](#footnote-1)]

[Insert Company registration and VAT numbers]

[Insert Consumer name and site address]

**Job reference Number:** [xxxx] **Date** [xx/xx/xxxx]

**Quotation**

|  |  |  |
| --- | --- | --- |
| **Description of goods and services[[2]](#footnote-2)** | **Quantity** | **Total** |
| **Goods** |  |  |
| Solar Collectors |  |  |
| Cylinder |  |  |
| Solar Controller |  |  |
| Pumping Station |  |  |
| Mounting Equipment |  |  |
|  |  Sub total (ex VAT) |  |
|  |  VAT@ *[insert applicable rate]* % |  |
| **Services** |  |  |
| Design and installation |  |  |
| Testing and commissioning |  |  |
| MCS Registration |  |  |
| EPC Assessment [if applicable] |  |  |
|  Sub-total (ex VAT) |  |
|  VAT@ *[insert applicable rate]* % |  |
|  GRAND TOTAL (inc VAT) |  |

This quotation is valid for: 30 days.

1. This quotation has been prepared following a site visit and survey.
2. If you request changes that will involve us in additional time or cost, or if unforeseen additional works are required, we will provide you with a revised quote. Any additional charges will be based on the installers’ hourly or daily rate of £[xx] per day/hour [delete as applicable].
3. You may have additional costs to pay for planning permission, building control fee and /or a Structural Engineers Survey and/or EPC Assessment [delete if not applicable].
4. This quote excludes [insert details of any other items excluded from quoted price that the customer might have to pay for].
5. We enclose a copy of our contract terms with this quote. Please read this carefully.
6. Please consider this Quote in conjunction with the installation performance estimate that we have provided.

**Important Information:**

**1: Your site survey and installation**

**The Full Site Survey**

This Quote is based on a site survey used to design the proposed system. We will ask you to approve the final full design before any work starts.

**2: Your Payment Terms**

[The terms you include below must reflect the consumer’s actual payment terms]

|  |  |
| --- | --- |
| **Payment Terms**  | £ |
| **Payment 1:** Deposit payable on confirmation of order [delete if not applicable][the deposit must not exceed 25% of the total sum inc VAT] | £ |
| **Payment 2:** Further advance payment payable 14 days prior to installation [delete if not applicable][Payments 1 + 2 must not exceed 60% of total sum inc. VAT] | £ |
| **Payment 3:**Balance payable on commissioning | £ |

[Insert your company name here] requires a deposit payment of £[insert amount here][**Note:** the deposit must not exceed 25% of the contract price, including VAT], on confirmation of the order [delete if not applicable]. We require a further advance payment 14 days prior to installation [delete if not applicable]. We will never ask you for more than 60% up-front, including the deposit.

Your deposit and any further advance payment [if applicable] will be insured with [insert insurance scheme name here] so that you can get the job completed or your money back if we cannot deliver your equipment because we have gone out of business.

[Insert your company name here] will use deposit protection insurance from [insert details of insurance provider here].

**3: Cancellation period and your right to cancel**

You have the right to cancel this contract during the ‘cancellation period’ without giving any reason.

**Note for Home Sellers:** The *Consumer Contracts (Information, Cancellation and Additional Charges) Regulations 2013* (the CCRs) apply when a consumer is asked to sign a contract during a sales visit to their home (or elsewhere and away from the Code member’s trade premises) in the presence of a representative of the Code member. This is known as home selling and is defined in the regulations as an ‘off-premises contract’.

**Members who agree ‘off-premises’ or ‘distance’ contracts:** should use the text immediately below this box. **OR…**

**Members who are sure this legislation does *not* apply:** see next guidance box below *- Cancellation for Members Using ‘On-Premises’ Contracts*.

**The cancellation period lasts 14 days and starts on the day the last good relating to the contract is delivered to you**. You can also cancel the contract without penalty before any of the goods are delivered. To exercise the right to cancel, you must inform us **[Insert company name, geographical address, telephone number, fax number and e-mail address]** of your decision to cancel this contract by a clear statement (e.g. a letter sent by post or e-mail). You may use the attached model cancellation form, but it is not obligatory. If you cancel within the cancellation period, we will return any deposit you may have paid in full. If you cancel after the cancellation period, we may have to charge you, based on the actual costs we have incurred by the time you cancel.

**Please Note:** If you want us to start work within the cancellation period for any reason then you must ask for this in writing. We must give you an ‘Express Request’ form for you to complete for this purpose. [members can obtain the model ‘Express Request’ here: <https://www.recc.org.uk/member/home> ]

See your contract for information on all your cancellation rights.

**Cancellation for Members Using ‘On-Premises’ Contracts**: Contracts that are not defined as ‘off premises’ or ‘distance’ are defined as ‘on-premises’ contracts and the CCRs do not apply. If the CCRs do not apply to your sales practice, then use the text immediately below. If you need more information about the regulations, see our *Guidance on the Consumer Contract Regulations 2013* here: <https://www.recc.org.uk/member/documents>

The Cancellation Period starts when the contract is signed and lasts for 14 days during which you may cancel the contract without penalty. You must cancel in writing, by post or email, to us at the above address. We have provided a cancellation form with this quotation.

If you cancel within this time, we will return any deposit you may have paid in full. If you cancel after this time, we may have to charge you, based on the actual costs we have incurred by the time you cancel.

We do not normally start any work until the end of your 14-day cancellation period. If you want us to start work sooner for any reason, please be aware that you must ask for this in writing.

See your contract for information on all your cancellation rights.

**Before you go ahead:**

**1. Planning Permission and Building Control**

[For England, Scotland or Wales use this paragraph]

In England, Wales and Scotland you generally do not need planning permission for the majority of home solar water heating systems provided they are below a certain size but you should check with your Local Authority Planning department particularly if the property is a listed building, in a conservation are or a World Heritage Site[[3]](#footnote-3). See this [Planning Portal for England and Wales](https://www.planningportal.co.uk/?docRef=LocalInformation&scope=202&langid=0)[[4]](#footnote-4). [OR]

The [Scottish Government Planning information](http://www.gov.scot/Topics/Built-Environment/planning)[[5]](#footnote-5).

[For Northern Ireland use this paragraph]

In Northern Ireland you may need planning permission for home solar water heating systems and you should check with your Divisional Planning Office before installation. Please note: obtaining planning permission after the system is in place can be difficult and expensive[[6]](#footnote-6). See

[The Northern Ireland Planning Portal.](https://www.nidirect.gov.uk/contacts/planning-offices-ni)[[7]](#footnote-7)

You are responsible for contacting your local planning authority to obtain confirmation that planning permission is not required.[[8]](#footnote-8)

[include next paragraph if applicable]

[insert your company name here] will complete a Building Notice application and submit it to your local authority building control service. There is a fee for this, which is included in the quote.

**2. Insurance**

It is recommended that you inform your property insurers about the proposed installation to check if it will increase your building’s insurance premium.

[Insert your company name here] has appropriate insurance to cover possible third-party damage, which may be caused by any of our activities in supplying a small-scale energy generator to you. We are insured by [insert insurer].

**3. Data protection**

Please be assured [Insert your company name here] will keep information about you in accordance with data protection legislation and will not pass information to any third party without your permission. As we are members of RECC, we may be required to share some information about your contract with them. We have provided you with the RECC *Use of Personal Data Notice* to let you know how they would use such information.

**Your install**

**1. Timetable for Works and Sub-contracting**

**Insert details of any known delay likely to affect the timetable e.g. availability of equipment**

**or customer’s building programme.**

We will agree installation dates with you in writing after the order has been confirmed and we have received your deposit if we have asked you for one. It usually takes [insert number] days to install a solar thermal system. Your installation will usually take place within [insert number] weeks of receiving your order, subject to workload and availability of materials.

**2. Sub-contracting installation Works** [if applicable]

**Under RECC, you must tell your customer if any sub-contractors will be used for the**

**installation work. This includes the use of sub-contractors to install cylinders, accumulator tanks or electrical work. Include this information here:**

[Insert your company name here] will subcontract [insert details of works] to [name of contractor]. In accordance with RECC, [Insert your company name here] is responsible for ensuring that all sub-contracted works are carried out to standards required by the Microgeneration Certification Scheme and RECC.

**3. Commissioning the system and handover**

As soon as the work is complete, we will commission your system in line with MCS standards to ensure that it is safe, has been installed in accordance with documented procedures and manufacturer’s requirements and is operating correctly in accordance with the design.

Under MCS rules, and following the testing and commissioning of the system, we must give you an MCS Certificate within 10 days. This certificate confirms that we have met the requirements of the MCS, and it details key information about the installation.

Following the testing and commissioning of the system, we will promptly give you a detailed document pack with information about your solar thermal system and this will include:

* A list of key components and solar thermal collector serial numbers.
* A certificate showing that the installation has been registered with the Microgeneration Certification Scheme.
* An ‘as fitted’ schematic plan of both plumbing and electrical systems.
* Details of the installation (as listed in Appendix B, B1 of MIS 3001, Version 4.0).
* User information and instructions (as listed in Appendix B, B2 of MIS 3001, Version 4.0).
* A completed Commissioning Checklist.

**4. After-Sales Support and Maintenance**

We will give you full operating and maintenance instructions. We will also give you advice about any maintenance requirements that are specific to the goods we have installed.

**You must insert any maintenance requirements for the specified technology/goods supplied here.**

[Insert your company name here] provides optional servicing and/or maintenance contracts at additional cost [Delete If not applicable].

**5. Guarantees and Workmanship Warranty**

Your equipment is guaranteed by its manufacturer. The guarantees are [include where applicable]:

[number of years] for solar collectors

[number of years] for the cylinder

[number of years] solar controller

[Insert information on product guarantees for all other main components.]

Any products damaged during installation shall be replaced free of charge.

We guarantee our workmanship for [insert number] years from date of install [you must provide a minimum of 2 years Workmanship Warranty]. This workmanship warranty will be transferable to the new legal owner of the property if it is sold during the warranty period.

**6. Workmanship warranty insurance**

As members of RECC, we are required to have arrangements in place so that your workmanship warranty from us will still be honoured if we should we go out of business for any reason during the warranty period.

Your workmanship warranty is insured under the [insert scheme name]. You will receive an individual policy document in your name confirming this. [If this is not the case, explain here how consumer gets details of the insurance.]

**ACCEPTING THIS QUOTATION**

**To accept this quotation please sign and return the Order Form below to** [insert your company details here]together with your deposit payment. Thank you for your order.

**Please note**: Members must ALSO include with the quote:

* the MCS Compliant Performance Estimate;
* terms of business/Terms and conditions/contract (there is a RECC model you can use); and
* a cancellation form appropriate to whether the agreement was made ‘off premises’ or not (there are RECC models you can use: <https://www.recc.org.uk/member/documents>).

**Note for Home Sellers:** by law, you must inform the consumer of, or how to make available, your complaint-handling policy.

**COMPLAINTS**

We hope you won’t have any reason to complain about any aspect of our service. But if you do, please contact us.

I**nsert here:** full details of how a consumer can make a complaint **OR** refer them to your website if your complaints procedure is set out there. You must also include the address for consumer complaints if this is different from your address (or the address of the trader that you are acting for).

**If we cannot resolve your complaint, you may be able to complain to RECC. You can read about this here:** [**http://www.recc.org.uk/consumers/how-to-complain**](http://www.recc.org.uk/consumers/how-to-complain)

[Insert company name and address]

**ORDER FORM**

|  |  |
| --- | --- |
| **Consumer name:** |  |
| **Site address:** |  |
|  |  |
|  |  |
|  |  |
| **Reference Number:** |  |
| **Date of Quote:** |  |

**To accept the quotation please sign and return this page to** [insert company details]

We / I agree to the quotation and confirm the order for the products and installation services specified.

We / I agree to the total cost and payment terms set out above.

We / I have read and agree to abide by [Insert your company name here] Terms and Conditions provided with the quotation

|  |  |
| --- | --- |
| Name: |  |
| Signature: |  |
| Date: |  |

You can pay by BACS bank transfer, debit or credit card to [insert company details].

1. You may also insert Company MCS, RECC and TrustMark registration numbers, where applicable. [↑](#footnote-ref-1)
2. If you make a delivery charge you must itemise this separately. [↑](#footnote-ref-2)
3. http://www.energysavingtrust.org.uk/domestic/reports/solar-pv-choosing-site-and-getting-planning-permission [↑](#footnote-ref-3)
4. <https://www.planningportal.co.uk/?docRef=LocalInformation&scope=202&langid=0> [↑](#footnote-ref-4)
5. <https://www.eplanning.scot/ePlanningClient/> [↑](#footnote-ref-5)
6. <http://www.nidirect.gov.uk/solar-thermal-panels> [↑](#footnote-ref-6)
7. <https://www.nidirect.gov.uk/contacts/planning-offices-ni> [↑](#footnote-ref-7)
8. [*Insert Company name*] cannot be held responsible for any installations carried out where planning permission was required but not obtained and we cannot offer refunds in such cases. [↑](#footnote-ref-8)