

# VEHICLE DESCRIPTION FORM

Used to create the main written description of the vehicle.

**Important:** This template is a general business record only and is not legal, tax, accounting or compliance advice. Adapt it for your process and have it checked by a qualified adviser before relying on it.

## 1. Vehicle / Customer / Core Details

Vehicle registration: _____	VIN/chassis number: _____
Make, model, trim: _____	Body type: _____
Fuel type: _____	Transmission: _____
Engine size: _____	Colour: _____
Mileage: _____	Mileage status: _____
MOT expiry date: _____	Service history status: _____
Number of keys: _____	Date completed: _____

## 2. Description, Checks and Disclosure Details

Previous owners, if known: _____	Vehicle features: _____
Known defects: _____ _____	

## 3. Approval, Acknowledgement and Signatures

Salesperson/staff signature: _____	
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## 4. Office Use Only

Stock/deal file updated?: _____	Supporting documents attached?: _____
Reviewed by: _____	Date reviewed: _____

# ADVERT DESCRIPTION APPROVAL FORM

Used before a vehicle advert goes live.

**Important:** This template is a general business record only and is not legal, tax, accounting or compliance advice. Adapt it for your process and have it checked by a qualified adviser before relying on it.

## 1. Vehicle / Customer / Core Details

Vehicle registration: _____	Advert price: _____
Mileage shown: _____	Mileage discrepancy disclosed? Yes / No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A

## 2. Description, Checks and Disclosure Details

Advert title: _____	MOT status: _____
Service history wording: _____ _____	
Warranty wording: _____ _____	
Feature list checked: _____ _____	
Optional extras checked: _____	Known defects disclosed? Yes / No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A
Write-off status checked? Yes / No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	Admin/delivery fees included or clearly shown: _____

## 3. Approval, Acknowledgement and Signatures

Manager approval: _____	Date approved: _____
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## 4. Office Use Only

Stock/deal file updated?: _____	Supporting documents attached?: _____
Reviewed by: _____	Date reviewed: _____

# VEHICLE SPECIFICATION SHEET

Used to record the factual vehicle specification.

**Important:** This template is a general business record only and is not legal, tax, accounting or compliance advice. Adapt it for your process and have it checked by a qualified adviser before relying on it.

## 1. Vehicle / Customer / Core Details

Vehicle registration: _____	Make: _____
Model: _____	Variant/trim: _____
Body style: _____	Fuel type: _____
Transmission: _____	Engine size: _____
Colour: _____	

## 2. Description, Checks and Disclosure Details

Year: _____	Power output, if known: _____
Emissions band, if known: _____	ULEZ/CAZ status, if checked: _____
Number of seats: _____	Number of doors: _____
Factory options: _____	Aftermarket additions: _____

## 4. Office Use Only

Stock/deal file updated?: _____	Supporting documents attached?: _____
Reviewed by: _____	Date reviewed: _____

# VEHICLE FEATURES AND OPTIONS FORM

Used to record extras and features included with the car.

**Important:** This template is a general business record only and is not legal, tax, accounting or compliance advice. Adapt it for your process and have it checked by a qualified adviser before relying on it.

## 1. Vehicle / Customer / Core Details

Vehicle registration:

## 2. Description, Checks and Disclosure Details

☐ Alloy wheels

☐ Parking sensors

☐ Reversing camera

☐ Sat nav

☐ Bluetooth

☐ Apple CarPlay / Android Auto

☐ Heated seats

☐ Leather seats

☐ Cruise control

☐ Climate control

☐ Panoramic roof

☐ Tow bar

Driver assistance systems:

Features tested? Yes / No

☐ Yes ☐ No ☐ N/A

☐ Yes ☐ No ☐ N/A

Features working? Yes / No

☐ Yes ☐ No ☐ N/A

## 4. Office Use Only

Stock/deal file updated?:

Supporting documents attached?:

Reviewed by:

Date reviewed:

# VEHICLE EQUIPMENT VERIFICATION FORM

Used to check that advertised features are actually present and working.

**Important:** This template is a general business record only and is not legal, tax, accounting or compliance advice. Adapt it for your process and have it checked by a qualified adviser before relying on it.

## 1. Vehicle / Customer / Core Details

Vehicle registration:

Date checked:

## 2. Description, Checks and Disclosure Details

Feature being checked:

Present? Yes / No

☐ Yes ☐ No ☐ N/A

Working? Yes / No

☐ Yes ☐ No ☐ N/A

Not tested? Yes / No

☐ Yes ☐ No ☐ N/A

Fault found:

Repair required:

Advert wording updated? Yes / No

☐ Yes ☐ No ☐ N/A

## 3. Approval, Acknowledgement and Signatures

Checked by:

## 4. Office Use Only

Stock/deal file updated?:

Supporting documents attached?:

Reviewed by:

Date reviewed:

# MILEAGE DESCRIPTION FORM

Used to record how mileage is described to the customer.

**Important:** Business Companion says traders should carry out the necessary checks to verify mileage, and incorrect mileage can be a misleading action or misleading omission.

## 1. Vehicle / Customer / Core Details

Vehicle registration: _____	Mileage warranted? Yes / No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A
Mileage not warranted? Yes / No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	Mileage discrepancy? Yes / No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A
MOT mileage checked? Yes / No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	Service mileage checked? Yes / No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A
Customer disclosure required? Yes / No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	

## 2. Description, Checks and Disclosure Details

Odometer reading: _____	History check completed? Yes / No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A
Mileage wording for advert: _____ _____	
Mileage wording for invoice: _____ _____	

## 4. Office Use Only

Stock/deal file updated?: _____	Supporting documents attached?: _____
Reviewed by: _____	Date reviewed: _____

# SERVICE HISTORY DESCRIPTION FORM

Used to record how service history is described.

**Important:** This template is a general business record only and is not legal, tax, accounting or compliance advice. Adapt it for your process and have it checked by a qualified adviser before relying on it.

## 1. Vehicle / Customer / Core Details

Vehicle registration: _____	Full service history: _____
Part service history: _____	No service history: _____
Last service mileage: _____	

## 2. Description, Checks and Disclosure Details

Digital service record: _____	Service book present? Yes / No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A
Service invoices present? Yes / No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	Main dealer history? Yes / No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A
Independent garage history? Yes / No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	Last service date: _____
Timing belt/chain evidence: _____ _____	
Advert wording approved: _____ _____	

## 4. Office Use Only

Stock/deal file updated?: _____	Supporting documents attached?: _____
Reviewed by: _____	Date reviewed: _____

# MOT DESCRIPTION FORM

Used to record how MOT status is described.

**Important:** This template is a general business record only and is not legal, tax, accounting or compliance advice. Adapt it for your process and have it checked by a qualified adviser before relying on it.

## 1. Vehicle / Customer / Core Details

Vehicle registration:

\_\_\_\_\_

Current MOT expiry date:

\_\_\_\_\_

## 2. Description, Checks and Disclosure Details

MOT pass date:

\_\_\_\_\_

MOT advisories:

\_\_\_\_\_

Major defects history:

\_\_\_\_\_

\_\_\_\_\_

Dangerous defects history:

\_\_\_\_\_

\_\_\_\_\_

MOT work completed? Yes / No

☐ Yes ☐ No ☐ N/A

"12 months MOT" claim checked? Yes / No

☐ Yes ☐ No ☐ N/A

MOT wording for advert:

\_\_\_\_\_

\_\_\_\_\_

MOT wording for sales invoice:

\_\_\_\_\_

\_\_\_\_\_

## 3. Approval, Acknowledgement and Signatures

Staff signature:

\_\_\_\_\_

## 4. Office Use Only

Stock/deal file updated?:

\_\_\_\_\_

Supporting documents attached?:

\_\_\_\_\_

Reviewed by:

\_\_\_\_\_

Date reviewed:

\_\_\_\_\_



# WARRANTY DESCRIPTION FORM

Used to record what warranty wording is used in the advert and sales documents.

**Important:** This template is a general business record only and is not legal, tax, accounting or compliance advice. Adapt it for your process and have it checked by a qualified adviser before relying on it.

## 1. Vehicle / Customer / Core Details

Vehicle registration:

\_\_\_\_\_

Customer contribution, if any:

\_\_\_\_\_

## 2. Description, Checks and Disclosure Details

Warranty included? Yes / No

☐ Yes ☐ No ☐ N/A

Warranty duration:

\_\_\_\_\_

Warranty provider:

\_\_\_\_\_

Warranty level:

\_\_\_\_\_

Claim limit:

\_\_\_\_\_

Labour rate limit:

\_\_\_\_\_

Main exclusions summary:

\_\_\_\_\_

Warranty upgrade available? Yes / No

☐ Yes ☐ No ☐ N/A

Warranty wording approved:

\_\_\_\_\_

\_\_\_\_\_

Warranty terms attached? Yes / No

☐ Yes ☐ No ☐ N/A

## 4. Office Use Only

Stock/deal file updated?:

\_\_\_\_\_

Supporting documents attached?:

\_\_\_\_\_

Reviewed by:

\_\_\_\_\_

Date reviewed:

\_\_\_\_\_

# KNOWN DEFECTS DISCLOSURE FORM

Used when the vehicle has known faults that must be disclosed.

**Important:** This template is a general business record only and is not legal, tax, accounting or compliance advice. Adapt it for your process and have it checked by a qualified adviser before relying on it.

## 1. Vehicle / Customer / Core Details

Vehicle registration:

\_\_\_\_\_

Customer informed before purchase? Yes / No

☐ Yes ☐ No ☐ N/A

## 2. Description, Checks and Disclosure Details

Defect description:

\_\_\_\_\_

\_\_\_\_\_

Defect location:

\_\_\_\_\_

\_\_\_\_\_

Mechanical fault:

\_\_\_\_\_

\_\_\_\_\_

Electrical fault:

\_\_\_\_\_

\_\_\_\_\_

Cosmetic defect:

\_\_\_\_\_

\_\_\_\_\_

Warning light:

\_\_\_\_\_

MOT advisory:

\_\_\_\_\_

Repair agreed? Yes / No

☐ Yes ☐ No ☐ N/A

Price adjusted because of defect? Yes / No

☐ Yes ☐ No ☐ N/A

## 3. Approval, Acknowledgement and Signatures

Customer signature:

\_\_\_\_\_

Garage signature:

\_\_\_\_\_

## 4. Office Use Only

Stock/deal file updated?:

\_\_\_\_\_

Supporting documents attached?:

\_\_\_\_\_

Reviewed by:

\_\_\_\_\_

Date reviewed:

\_\_\_\_\_

# COSMETIC CONDITION DESCRIPTION FORM

Used to describe the bodywork and visual condition.

**Important:** This template is a general business record only and is not legal, tax, accounting or compliance advice. Adapt it for your process and have it checked by a qualified adviser before relying on it.

## 1. Vehicle / Customer / Core Details

Vehicle registration:

\_\_\_\_\_

General bodywork condition:

\_\_\_\_\_

## 2. Description, Checks and Disclosure Details

Paint condition:

\_\_\_\_\_

Dent notes:

\_\_\_\_\_

\_\_\_\_\_

Scratch notes:

\_\_\_\_\_

\_\_\_\_\_

Stone chips:

\_\_\_\_\_

Rust/corrosion:

\_\_\_\_\_

Wheel/alloy condition:

\_\_\_\_\_

Interior condition:

\_\_\_\_\_

Seat condition:

\_\_\_\_\_

Glass condition:

\_\_\_\_\_

Age-related marks statement:

\_\_\_\_\_

Photo evidence attached? Yes / No

☐ Yes ☐ No ☐ N/A

## 4. Office Use Only

Stock/deal file updated?:

\_\_\_\_\_

Supporting documents attached?:

\_\_\_\_\_

Reviewed by:

\_\_\_\_\_

Date reviewed:

\_\_\_\_\_

# MECHANICAL CONDITION DESCRIPTION FORM

Used to describe the mechanical condition of the vehicle.

**Important:** This template is a general business record only and is not legal, tax, accounting or compliance advice. Adapt it for your process and have it checked by a qualified adviser before relying on it.

## 1. Vehicle / Customer / Core Details

Vehicle registration:

\_\_\_\_\_

Engine condition:

\_\_\_\_\_

## 2. Description, Checks and Disclosure Details

Gearbox condition:

\_\_\_\_\_

Clutch condition:

\_\_\_\_\_

Brakes:

\_\_\_\_\_

Suspension:

\_\_\_\_\_

Steering:

\_\_\_\_\_

Exhaust:

\_\_\_\_\_

Warning lights:

\_\_\_\_\_

Diagnostic faults:

\_\_\_\_\_

\_\_\_\_\_

Road test notes:

\_\_\_\_\_

\_\_\_\_\_

Inspection completed? Yes / No

☐ Yes ☐ No ☐ N/A

Repairs completed? Yes / No

☐ Yes ☐ No ☐ N/A

## 3. Approval, Acknowledgement and Signatures

Technician signature:

\_\_\_\_\_

## 4. Office Use Only

Stock/deal file updated?:

\_\_\_\_\_

Supporting documents attached?:

\_\_\_\_\_

Reviewed by:

\_\_\_\_\_

Date reviewed:

\_\_\_\_\_

# ROADWORTHINESS DESCRIPTION FORM

Used to record whether the vehicle is being sold as roadworthy, for repair, or for parts. Used vehicles offered for sale by traders must be safe and roadworthy. Business Companion says exposing an unsafe or unroadworthy vehicle for sale may be a criminal offence.

**Important:** This template is a general business record only and is not legal, tax, accounting or compliance advice. Adapt it for your process and have it checked by a qualified adviser before relying on it.

## 1. Vehicle / Customer / Core Details

Vehicle registration:

## 2. Description, Checks and Disclosure Details

Roadworthy? Yes / No

☐ Yes ☐ No ☐ N/A

MOT status:

Safety checks completed:

Dangerous defects known? Yes / No

☐ Yes ☐ No ☐ N/A

Sold for road use? Yes / No

☐ Yes ☐ No ☐ N/A

Sold for repair? Yes / No

☐ Yes ☐ No ☐ N/A

Sold for parts/scrap? Yes / No

☐ Yes ☐ No ☐ N/A

Transport required? Yes / No

☐ Yes ☐ No ☐ N/A

Customer/trade buyer acknowledgement:

## 3. Approval, Acknowledgement and Signatures

Manager approval:

## 4. Office Use Only

Stock/deal file updated?:

Supporting documents attached?:

Reviewed by:

Date reviewed:

# INSURANCE WRITE-OFF DESCRIPTION FORM

Used where the vehicle has been written off or has an insurance category.

**Important:** This template is a general business record only and is not legal, tax, accounting or compliance advice. Adapt it for your process and have it checked by a qualified adviser before relying on it.

## 1. Vehicle / Customer / Core Details

Vehicle registration:

## 2. Description, Checks and Disclosure Details

Insurance write-off marker? Yes / No

☐ Yes ☐ No ☐ N/A

Category A / B / S / N / other:

Date of write-off, if known:

Repair evidence supplied? Yes / No

☐ Yes ☐ No ☐ N/A

Structural repair evidence, if applicable:

Disclosure wording for advert:

Disclosure wording for sales invoice:

Customer acknowledgement:

## 3. Approval, Acknowledgement and Signatures

Customer signature:

## 4. Office Use Only

Stock/deal file updated?:

Supporting documents attached?:

Reviewed by:

Date reviewed:

# ACCIDENT DAMAGE DESCRIPTION FORM

Used where accident damage is known, suspected, or repaired.

**Important:** This template is a general business record only and is not legal, tax, accounting or compliance advice. Adapt it for your process and have it checked by a qualified adviser before relying on it.

## 1. Vehicle / Customer / Core Details

Vehicle registration:

## 2. Description, Checks and Disclosure Details

Accident history known? Yes / No

☐ Yes ☐ No ☐ N/A

Area damaged:

Repair completed? Yes / No

☐ Yes ☐ No ☐ N/A

Repair quality checked? Yes / No

☐ Yes ☐ No ☐ N/A

Repair invoices supplied? Yes / No

☐ Yes ☐ No ☐ N/A

Photos supplied? Yes / No

☐ Yes ☐ No ☐ N/A

Structural damage suspected? Yes / No

☐ Yes ☐ No ☐ N/A

Disclosure required? Yes / No

☐ Yes ☐ No ☐ N/A

Customer acknowledgement:

## 4. Office Use Only

Stock/deal file updated?:

Supporting documents attached?:

Reviewed by:

Date reviewed:

# PREVIOUS USE DESCRIPTION FORM

Used to disclose how the vehicle was previously used.

**Important:** This template is a general business record only and is not legal, tax, accounting or compliance advice. Adapt it for your process and have it checked by a qualified adviser before relying on it.

## 1. Vehicle / Customer / Core Details

Vehicle registration: _____	<input type="checkbox"/> Company/fleet use
<input type="checkbox"/> Driving school use	

## 2. Description, Checks and Disclosure Details

<input type="checkbox"/> Private use	<input type="checkbox"/> Rental use
<input type="checkbox"/> Taxi/private hire use	<input type="checkbox"/> Courtesy car use
<input type="checkbox"/> Police/emergency service use	<b>Previous use verified? Yes / No</b> <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A
Disclosure wording: _____ _____	

## 3. Approval, Acknowledgement and Signatures

Customer signature: _____	
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## 4. Office Use Only

Stock/deal file updated?: _____	Supporting documents attached?: _____
Reviewed by: _____	Date reviewed: _____



# EX-TAXI / PRIVATE HIRE DISCLOSURE FORM

Used when the vehicle was previously used as a taxi or private hire vehicle.

**Important:** This template is a general business record only and is not legal, tax, accounting or compliance advice. Adapt it for your process and have it checked by a qualified adviser before relying on it.

## 1. Vehicle / Customer / Core Details

Vehicle registration: _____	Mileage pattern reviewed: _____
Customer told before purchase? Yes / No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	

## 2. Description, Checks and Disclosure Details

Taxi/private hire use confirmed? Yes / No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	Licensing authority, if known: _____
Plate evidence found? Yes / No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
Interior wear noted: _____	Disclosure wording for advert: _____ _____

## 3. Approval, Acknowledgement and Signatures

Customer signature: _____	
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## 4. Office Use Only

Stock/deal file updated?: _____	Supporting documents attached?: _____
Reviewed by: _____	Date reviewed: _____

# EX-RENTAL / FLEET DISCLOSURE FORM

Used where the car was previously a rental, lease, or fleet vehicle.

**Important:** This template is a general business record only and is not legal, tax, accounting or compliance advice. Adapt it for your process and have it checked by a qualified adviser before relying on it.

## 1. Vehicle / Customer / Core Details

Vehicle registration:

\_\_\_\_\_

Lease company known? Yes / No

☐ Yes ☐ No ☐ N/A

## 2. Description, Checks and Disclosure Details

Rental use confirmed? Yes / No

☐ Yes ☐ No ☐ N/A

Fleet use confirmed? Yes / No

☐ Yes ☐ No ☐ N/A

Previous keeper information:

\_\_\_\_\_

Service record checked:

\_\_\_\_\_

Customer disclosure wording:

\_\_\_\_\_

\_\_\_\_\_

Customer acknowledgement:

\_\_\_\_\_

\_\_\_\_\_

## 3. Approval, Acknowledgement and Signatures

Date signed:

\_\_\_\_\_

## 4. Office Use Only

Stock/deal file updated?:

\_\_\_\_\_

Supporting documents attached?:

\_\_\_\_\_

Reviewed by:

\_\_\_\_\_

Date reviewed:

\_\_\_\_\_

# IMPORT / EXPORT DESCRIPTION FORM

Used where the vehicle was imported, exported, or previously registered overseas.

**Important:** This template is a general business record only and is not legal, tax, accounting or compliance advice. Adapt it for your process and have it checked by a qualified adviser before relying on it.

## 1. Vehicle / Customer / Core Details

Vehicle registration: _____	Country of origin: _____
Date first registered overseas: _____	Date first registered in UK: _____

## 2. Description, Checks and Disclosure Details

Odometer in miles or kilometres: _____	UK specification? Yes / No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A
Import documents checked? Yes / No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	Export marker found? Yes / No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A
Disclosure wording: _____ _____	

## 3. Approval, Acknowledgement and Signatures

Customer signature: _____	
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## 4. Office Use Only

Stock/deal file updated?: _____	Supporting documents attached?: _____
Reviewed by: _____	Date reviewed: _____

# MODIFIED VEHICLE DESCRIPTION FORM

Used when the vehicle has aftermarket modifications.

**Important:** This template is a general business record only and is not legal, tax, accounting or compliance advice. Adapt it for your process and have it checked by a qualified adviser before relying on it.

## 1. Vehicle / Customer / Core Details

Vehicle registration: _____	Engine modifications: _____
Body modification: _____	

## 2. Description, Checks and Disclosure Details

Remap/tuning: _____	Exhaust modification: _____
Suspension modification: _____	Wheel modification: _____
Interior modification: _____	Insurance disclosure advised? Yes / No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A
Modification documents supplied? Yes / No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	Customer acknowledgement: _____ _____

## 3. Approval, Acknowledgement and Signatures

Customer signature: _____	
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## 4. Office Use Only

Stock/deal file updated?: _____	Supporting documents attached?: _____
Reviewed by: _____	Date reviewed: _____

# VEHICLE COLOUR / WRAP DESCRIPTION FORM

Used where the vehicle colour, wrap, or respray needs explaining.

**Important:** This template is a general business record only and is not legal, tax, accounting or compliance advice. Adapt it for your process and have it checked by a qualified adviser before relying on it.

## 1. Vehicle / Customer / Core Details

Vehicle registration: _____	Colour on V5C: _____
Current visible colour: _____	Colour change recorded with DVLA? Yes / No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A

## 2. Description, Checks and Disclosure Details

Wrapped? Yes / No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	Resprayed? Yes / No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A
Paint condition notes: _____ _____	
Disclosure wording: _____ _____	
Customer acknowledgement: _____ _____	

## 4. Office Use Only

Stock/deal file updated?: _____	Supporting documents attached?: _____
Reviewed by: _____	Date reviewed: _____

# NUMBER PLATE / PRIVATE PLATE DESCRIPTION FORM

Used where a private plate was removed, retained, or added.

**Important:** This template is a general business record only and is not legal, tax, accounting or compliance advice. Adapt it for your process and have it checked by a qualified adviser before relying on it.

## 1. Vehicle / Customer / Core Details

<b>Current registration:</b> _____	<b>Previous registration:</b> _____
<b>Customer informed? Yes / No</b> <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	

## 2. Description, Checks and Disclosure Details

<b>Private plate involved? Yes / No</b> <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	<b>Plate retention completed? Yes / No</b> <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A
<b>V5C updated? Yes / No</b> <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	<b>Advert registration correct? Yes / No</b> <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A
<b>History check updated? Yes / No</b> <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	

## 4. Office Use Only

<b>Stock/deal file updated?:</b> _____	<b>Supporting documents attached?:</b> _____
<b>Reviewed by:</b> _____	<b>Date reviewed:</b> _____

# OUTSTANDING FINANCE CLEARANCE DESCRIPTION FORM

Used where finance was previously recorded but has now been settled.

**Important:** This template is a general business record only and is not legal, tax, accounting or compliance advice. Adapt it for your process and have it checked by a qualified adviser before relying on it.

## 1. Vehicle / Customer / Core Details

Vehicle registration: _____	Finance company name: _____
Customer disclosure needed? Yes / No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	

## 2. Description, Checks and Disclosure Details

Previous finance marker found? Yes / No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	Settlement paid? Yes / No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A
Clearance letter received? Yes / No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	History check updated? Yes / No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A
Advert wording required? Yes / No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	

## 3. Approval, Acknowledgement and Signatures

Manager approval: _____	
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## 4. Office Use Only

Stock/deal file updated?: _____	Supporting documents attached?: _____
Reviewed by: _____	Date reviewed: _____

# VEHICLE HISTORY DISCLOSURE FORM

Used to tell the buyer about any important history issue.

**Important:** This template is a general business record only and is not legal, tax, accounting or compliance advice. Adapt it for your process and have it checked by a qualified adviser before relying on it.

## 1. Vehicle / Customer / Core Details

Vehicle registration:

\_\_\_\_\_

Mileage anomaly:

\_\_\_\_\_

Customer confirms disclosure received before purchase:

\_\_\_\_\_

## 2. Description, Checks and Disclosure Details

Finance history:

\_\_\_\_\_

Write-off history:

\_\_\_\_\_

Stolen marker check:

\_\_\_\_\_

Previous use:

\_\_\_\_\_

Import/export marker:

\_\_\_\_\_

Plate changes:

\_\_\_\_\_

Number of keepers:

\_\_\_\_\_

History report reference:

\_\_\_\_\_

## 3. Approval, Acknowledgement and Signatures

Customer signature:

\_\_\_\_\_

## 4. Office Use Only

Stock/deal file updated?:

\_\_\_\_\_

Supporting documents attached?:

\_\_\_\_\_

Reviewed by:

\_\_\_\_\_

Date reviewed:

\_\_\_\_\_



# VEHICLE DESCRIPTION CUSTOMER ACKNOWLEDGEMENT FORM

Used when the customer signs to confirm they have read and understood the description.

**Important:** This template is a general business record only and is not legal, tax, accounting or compliance advice. Adapt it for your process and have it checked by a qualified adviser before relying on it.

## 1. Vehicle / Customer / Core Details

<b>Customer full name:</b> _____	<b>Vehicle registration:</b> _____
<b>Service history reviewed? Yes / No</b> <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	<b>Customer confirms they had chance to ask questions:</b> _____

## 2. Description, Checks and Disclosure Details

<b>Vehicle description reviewed? Yes / No</b> <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
<b>Mileage description reviewed? Yes / No</b> <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
<b>MOT status reviewed? Yes / No</b> <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	<b>Warranty description reviewed? Yes / No</b> <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A
<b>Known defects reviewed? Yes / No</b> <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	

## 3. Approval, Acknowledgement and Signatures

<b>Customer signature:</b> _____	<b>Date signed:</b> _____
-------------------------------------	------------------------------

## 4. Office Use Only

<b>Stock/deal file updated?:</b> _____	<b>Supporting documents attached?:</b> _____
<b>Reviewed by:</b> _____	<b>Date reviewed:</b> _____

# VEHICLE ADVERT COPY RECORD

Used to store the final advert text used online.

**Important:** This template is a general business record only and is not legal, tax, accounting or compliance advice. Adapt it for your process and have it checked by a qualified adviser before relying on it.

## 1. Vehicle / Customer / Core Details

Vehicle registration: _____	Price shown: _____
Mileage shown: _____	Platform posted to: _____
Date posted: _____	

## 2. Description, Checks and Disclosure Details

Advert title: _____	Main advert description: _____ _____
Feature list: _____ _____	
MOT wording: _____ _____	
Warranty wording: _____ _____	
Disclosure wording: _____ _____	

## 3. Approval, Acknowledgement and Signatures

Staff member: _____	
------------------------	--

## 4. Office Use Only

Stock/deal file updated?: _____	Supporting documents attached?: _____
Reviewed by: _____	Date reviewed: _____

# MULTI-PLATFORM ADVERT DESCRIPTION RECORD

Used when the vehicle is advertised on more than one site.

**Important:** This template is a general business record only and is not legal, tax, accounting or compliance advice. Adapt it for your process and have it checked by a qualified adviser before relying on it.

## 1. Vehicle / Customer / Core Details

Vehicle registration: _____	Auto Trader advert checked? Yes / No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A
Price consistent? Yes / No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	Mileage consistent? Yes / No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A

## 2. Description, Checks and Disclosure Details

Website advert checked? Yes / No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	eBay advert checked? Yes / No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A
Facebook advert checked? Yes / No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	CarGurus advert checked? Yes / No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A
Motors advert checked? Yes / No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	Descriptions consistent across platforms? Yes / No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A

## 3. Approval, Acknowledgement and Signatures

Manager approval: _____	
----------------------------	--

## 4. Office Use Only

Stock/deal file updated?: _____	Supporting documents attached?: _____
Reviewed by: _____	Date reviewed: _____

# PRICE DESCRIPTION AND FEE DISCLOSURE FORM

Used to record how the price is shown to customers.

**Important:** Business Companion warns that failing to include non-optional charges, such as compulsory admin or delivery fees, in the advertised price can mislead consumers.

## 1. Vehicle / Customer / Core Details

Vehicle registration: _____	Advertised price: _____
Optional extras excluded from price: _____	Compulsory fees included in advertised price? Yes / No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A
Finance price different from cash price? Yes / No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	Customer told full price? Yes / No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A

## 2. Description, Checks and Disclosure Details

Admin fee, if any: _____	Delivery fee, if mandatory: _____
Optional delivery fee: _____	

## 3. Approval, Acknowledgement and Signatures

Manager approval: _____	
----------------------------	--

## 4. Office Use Only

Stock/deal file updated?: _____	Supporting documents attached?: _____
Reviewed by: _____	Date reviewed: _____

# SALESPERSON VERBAL DESCRIPTION RECORD

Used to record important verbal statements made to the customer.

**Important:** This template is a general business record only and is not legal, tax, accounting or compliance advice. Adapt it for your process and have it checked by a qualified adviser before relying on it.

## 1. Vehicle / Customer / Core Details

Customer name:

---

Vehicle registration:

---

Mileage statement made:

---

Service history statement made:

---

## 2. Description, Checks and Disclosure Details

Date/time of discussion:

---

Warranty statement made:

---

Previous owner/use statement made:

---

Known defects explained:

---

---

Customer questions answered:

---

---

Notes saved to deal file:

---

---

## 3. Approval, Acknowledgement and Signatures

Salesperson name:

---

## 4. Office Use Only

Stock/deal file updated?:

---

Supporting documents attached?:

---

Reviewed by:

---

Date reviewed:

---

# VIDEO WALKAROUND DESCRIPTION RECORD

Used when a salesperson sends a video to the customer.

**Important:** This template is a general business record only and is not legal, tax, accounting or compliance advice. Adapt it for your process and have it checked by a qualified adviser before relying on it.

## 1. Vehicle / Customer / Core Details

Customer name: _____	Vehicle registration: _____
Dashboard mileage: _____	Engine bay: _____
Customer received video? Yes / No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	

## 2. Description, Checks and Disclosure Details

Date video recorded: _____	Areas shown: _____
Exterior: _____	Interior: _____
Wheels/tyres: _____	Known defects shown: _____ _____
Video link/file saved? Yes / No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	

## 4. Office Use Only

Stock/deal file updated?: _____	Supporting documents attached?: _____
Reviewed by: _____	Date reviewed: _____

# PHOTO DESCRIPTION AND EVIDENCE FORM

Used to record photos supporting the vehicle description.

**Important:** This template is a general business record only and is not legal, tax, accounting or compliance advice. Adapt it for your process and have it checked by a qualified adviser before relying on it.

## 1. Vehicle / Customer / Core Details

Vehicle registration: _____	Dashboard mileage photo: _____
Service history photos: _____	

## 2. Description, Checks and Disclosure Details

Front photo: _____	Rear photo: _____
Driver side photo: _____	Passenger side photo: _____
Interior photos: _____	Tyre/wheel photos: _____
Damage photos: _____ _____	
V5C/key photos, if policy allows: _____	Photos saved to vehicle file? Yes / No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A

## 4. Office Use Only

Stock/deal file updated?: _____	Supporting documents attached?: _____
Reviewed by: _____	Date reviewed: _____

# FEATURE FAULT DISCLOSURE FORM

Used where a feature is present but faulty or not tested.

**Important:** This template is a general business record only and is not legal, tax, accounting or compliance advice. Adapt it for your process and have it checked by a qualified adviser before relying on it.

## 1. Vehicle / Customer / Core Details

Vehicle registration: _____	Feature name: _____
Price adjusted? Yes / No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	Customer informed before sale? Yes / No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A

## 2. Description, Checks and Disclosure Details

Fault description: _____ _____	
Not working / intermittent / not tested <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	Repair agreed? Yes / No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A
Customer acknowledgement: _____ _____	

## 3. Approval, Acknowledgement and Signatures

Signature: _____	Date signed: _____
---------------------	-----------------------

## 4. Office Use Only

Stock/deal file updated?: _____	Supporting documents attached?: _____
Reviewed by: _____	Date reviewed: _____



# MISSING ITEM DISCLOSURE FORM

Used where items are missing but may normally be expected.

**Important:** This template is a general business record only and is not legal, tax, accounting or compliance advice. Adapt it for your process and have it checked by a qualified adviser before relying on it.

## 1. Vehicle / Customer / Core Details

Vehicle registration:

## 2. Description, Checks and Disclosure Details

Missing spare key:

Missing service book:

Missing handbook:

Missing locking wheel nut:

Missing SD/nav card:

Missing parcel shelf:

Missing charging cable:

Missing spare wheel/inflation kit:

Replacement agreed? Yes / No  
☐ Yes ☐ No ☐ N/A

Customer acknowledgement:

## 4. Office Use Only

Stock/deal file updated?:

Supporting documents attached?:

Reviewed by:

Date reviewed:

# VEHICLE DESCRIPTION AMENDMENT FORM

Used when a description changes after advert, quote, or order.

**Important:** This template is a general business record only and is not legal, tax, accounting or compliance advice. Adapt it for your process and have it checked by a qualified adviser before relying on it.

## 1. Vehicle / Customer / Core Details

Vehicle registration:

\_\_\_\_\_

Mileage correction:

\_\_\_\_\_

Service history correction:

\_\_\_\_\_

Customer informed? Yes / No

☐ Yes ☐ No ☐ N/A

## 2. Description, Checks and Disclosure Details

Original description:

\_\_\_\_\_

\_\_\_\_\_

Revised description:

\_\_\_\_\_

\_\_\_\_\_

Reason for change:

\_\_\_\_\_

MOT correction:

\_\_\_\_\_

Feature correction:

\_\_\_\_\_

Defect discovered:

\_\_\_\_\_

\_\_\_\_\_

Advert updated? Yes / No

☐ Yes ☐ No ☐ N/A

## 3. Approval, Acknowledgement and Signatures

Manager approval:

\_\_\_\_\_

## 4. Office Use Only

Stock/deal file updated?:

\_\_\_\_\_

Supporting documents attached?:

\_\_\_\_\_

Reviewed by:

\_\_\_\_\_

Date reviewed:

\_\_\_\_\_

# DESCRIPTION ERROR CORRECTION FORM

Used when an advert, invoice, or sales order contained an error.

**Important:** This template is a general business record only and is not legal, tax, accounting or compliance advice. Adapt it for your process and have it checked by a qualified adviser before relying on it.

## 1. Vehicle / Customer / Core Details

Vehicle registration:

\_\_\_\_\_

Customer notified? Yes / No

☐ Yes ☐ No ☐ N/A

## 2. Description, Checks and Disclosure Details

Error location:

\_\_\_\_\_

Website advert:

\_\_\_\_\_

Third-party advert:

\_\_\_\_\_

Quote:

\_\_\_\_\_

Sales order:

\_\_\_\_\_

Invoice:

\_\_\_\_\_

Error details:

\_\_\_\_\_

Correct information:

\_\_\_\_\_

Correction date:

\_\_\_\_\_

## 3. Approval, Acknowledgement and Signatures

Manager sign-off:

\_\_\_\_\_

## 4. Office Use Only

Stock/deal file updated?:

\_\_\_\_\_

Supporting documents attached?:

\_\_\_\_\_

Reviewed by:

\_\_\_\_\_

Date reviewed:

\_\_\_\_\_

# DESCRIPTION DISPUTE RECORD

Used if the customer disputes how the car was described.

**Important:** This template is a general business record only and is not legal, tax, accounting or compliance advice. Adapt it for your process and have it checked by a qualified adviser before relying on it.

## 1. Vehicle / Customer / Core Details

Customer full name: _____	Vehicle registration: _____
Customer claim: _____	

## 2. Description, Checks and Disclosure Details

Date of complaint: _____	Description disputed: _____ _____
Advert copy reviewed: _____	Sales order reviewed: _____
Invoice reviewed: _____	Photos/videos reviewed: _____
Staff notes reviewed: _____ _____	
Outcome: _____ _____	

## 3. Approval, Acknowledgement and Signatures

Manager decision: _____	
----------------------------	--

## 4. Office Use Only

Stock/deal file updated?: _____	Supporting documents attached?: _____
Reviewed by: _____	Date reviewed: _____

# DISTANCE SALE VEHICLE DESCRIPTION PACK

Used when the customer buys without seeing the vehicle in person.

**Important:** This template is a general business record only and is not legal, tax, accounting or compliance advice. Adapt it for your process and have it checked by a qualified adviser before relying on it.

## 1. Vehicle / Customer / Core Details

Customer full name: _____	Vehicle registration: _____
Mileage shown: _____	Service history shown: _____

## 2. Description, Checks and Disclosure Details

Full vehicle description supplied: _____ _____	
Photos supplied: _____	Video supplied: _____
MOT status shown: _____	Known defects disclosed: _____ _____
Delivery details: _____	Cancellation rights provided? Yes / No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A
Customer acknowledgement: _____ _____	

## 4. Office Use Only

Stock/deal file updated?: _____	Supporting documents attached?: _____
Reviewed by: _____	Date reviewed: _____

# TRADE SALE VEHICLE DESCRIPTION FORM

Used when selling a vehicle to another motor trader.

**Important:** This template is a general business record only and is not legal, tax, accounting or compliance advice. Adapt it for your process and have it checked by a qualified adviser before relying on it.

## 1. Vehicle / Customer / Core Details

Buyer/trader name: _____	Vehicle registration: _____
VIN/chassis number: _____	Mileage: _____
Price: _____	

## 2. Description, Checks and Disclosure Details

MOT status: _____	Known defects: _____ _____
Write-off status: _____	Roadworthiness status: _____
Sold as retail-ready / repair / spares / trade stock: _____	Buyer acknowledgement: _____ _____

## 3. Approval, Acknowledgement and Signatures

Signatures: _____	
----------------------	--

## 4. Office Use Only

Stock/deal file updated?: _____	Supporting documents attached?: _____
Reviewed by: _____	Date reviewed: _____

# SPARES OR REPAIRS DESCRIPTION FORM

Used where a vehicle is not being sold as roadworthy.

**Important:** This template is a general business record only and is not legal, tax, accounting or compliance advice. Adapt it for your process and have it checked by a qualified adviser before relying on it.

## 1. Vehicle / Customer / Core Details

Buyer name:

\_\_\_\_\_

Vehicle registration:

\_\_\_\_\_

VIN/chassis number:

\_\_\_\_\_

Buyer confirms vehicle is for repair, parts, or trade use:

\_\_\_\_\_

## 2. Description, Checks and Disclosure Details

Vehicle not sold for road use? Yes / No

☐ Yes ☐ No ☐ N/A

Known safety issues:

\_\_\_\_\_

Known mechanical faults:

\_\_\_\_\_

\_\_\_\_\_

MOT status:

\_\_\_\_\_

Must be transported away? Yes / No

☐ Yes ☐ No ☐ N/A

## 3. Approval, Acknowledgement and Signatures

Manager approval:

\_\_\_\_\_

Buyer signature:

\_\_\_\_\_

## 4. Office Use Only

Stock/deal file updated?:

\_\_\_\_\_

Supporting documents attached?:

\_\_\_\_\_

Reviewed by:

\_\_\_\_\_

Date reviewed:

\_\_\_\_\_

# FINAL VEHICLE DESCRIPTION FILE CHECKLIST

Used before the sale file is closed.

**Important:** This template is a general business record only and is not legal, tax, accounting or compliance advice. Adapt it for your process and have it checked by a qualified adviser before relying on it.

## 1. Vehicle / Customer / Core Details

Main vehicle description saved:

\_\_\_\_\_  
\_\_\_\_\_

Advert copy saved:

\_\_\_\_\_

Mileage wording checked:

\_\_\_\_\_  
\_\_\_\_\_

MOT wording checked:

\_\_\_\_\_  
\_\_\_\_\_

Service history wording checked:

\_\_\_\_\_  
\_\_\_\_\_

Warranty wording checked:

\_\_\_\_\_  
\_\_\_\_\_

## 2. Description, Checks and Disclosure Details

Feature list checked:

\_\_\_\_\_  
\_\_\_\_\_

Known defects disclosed:

\_\_\_\_\_  
\_\_\_\_\_

History issues disclosed:

\_\_\_\_\_  
\_\_\_\_\_

Photos/video saved:

\_\_\_\_\_

Customer acknowledgement signed:

\_\_\_\_\_  
\_\_\_\_\_

## 3. Approval, Acknowledgement and Signatures

Manager sign-off:

\_\_\_\_\_

## 4. Office Use Only

Stock/deal file updated?:

\_\_\_\_\_

Supporting documents attached?:

\_\_\_\_\_

Reviewed by:

\_\_\_\_\_

Date reviewed:

\_\_\_\_\_