

# EXXARO ENTERPRISE AND SUPPLIER DEVELOPMENT

## QUICK REFERENCE GUIDE: FUNDING APPLICATION PROCESS

The Exxaro Enterprise and Supplier Development (ESD) fund application process can be initiated online via the Community Portal link below: <https://corporateaffairs.microsoftcrmportals.com/>

### Overview of the pre-qualification process

1. Register a profile on the portal
2. Follow the prompts online to complete your application for the funding you require
3. Once completed, you will receive a pre-qualification notification via e-mail which will indicate whether your application is successful or unsuccessful.

### Types of loan and grant funding available

- Asset finance
- Asset re-finance
- Bridging loan (suppliers only)
- Acquisition finance

### Documentation required for your application

- A one-page motivation letter to support your application (on company letterhead);
- Include quotes for assets/goods/ if re-financing, provide settlement letter;
- Company Profile;
- Company Registration Documents (CIPC) else state if Sole Proprietor;
- A valid B-BBEE certificate or EME/QSE Affidavit;
- A valid SARS Compliance PIN (Good standing);
- Certified copies of Identity Documents/ cards (required for all directors, members, partners, shareholders, etc.);
- List of employees
- CV's of directors
- Proposed budget showing costs;
- 12-months Financial Projections;
- Audited Financial Statements;
- Latest 3-months Management Accounts;
- Latest 3-months Bank Statements;
- Attach existing contracts /Off take agreements.

**Applications without all supporting documents will not be considered.**

**NB:** All applicants are required to store electronic copies of the above-mentioned documents on their own Dropbox, Google Drive or iCloud and share these files with ESD team and include the link in the portal electronic form.

# EXXARO ENTERPRISE AND SUPPLIER DEVELOPMENT

## QUICK REFERENCE GUIDE: FUNDING APPLICATION PROCESS

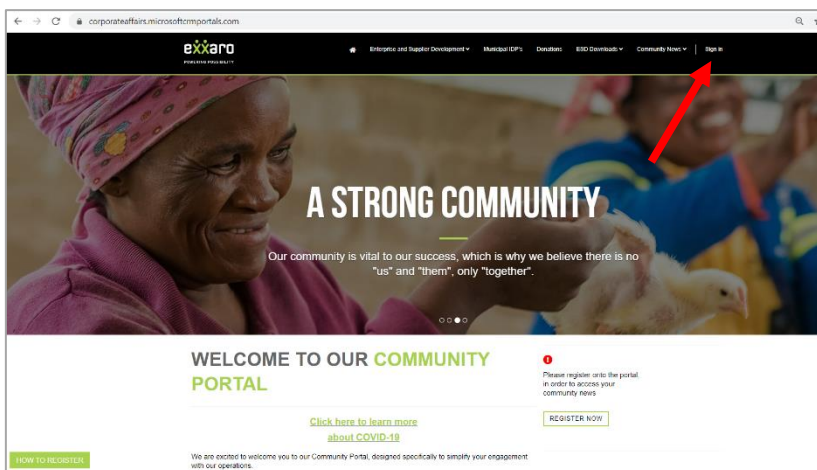
### APPLICATION PROCESS: STEP BY STEP GUIDE

#### Step 1: Follow the link

Click the link below or copy the link below and paste it in your web browser.

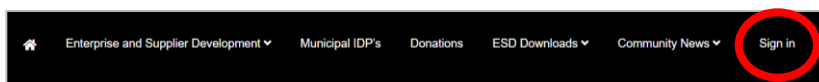
Community Portal link:

<https://corporateaffairs.microsoftcorpportals.com/>



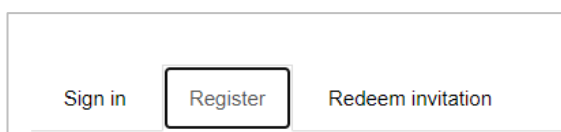
#### Step 2: Sign In

Select “Sign in” on the navigation pane of this page. (Refer to the red arrow in the image of the previous step)



#### Step 3: Register to create a profile

Select the “register” option, and complete the information required. If you already have a profile, ensure you “sign in”.



# EXXARO ENTERPRISE AND SUPPLIER DEVELOPMENT

## QUICK REFERENCE GUIDE: FUNDING APPLICATION PROCESS

### Step 4: Accept the terms and conditions

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☒ I agree to these terms and conditions.

CONTINUE

### Step 5: Your profile is now activated

- Your profile is now created, and a profile application form is activated for completion on further details about you.
- Complete the form in full (in red). At the end, ensure you select the 'Community' that you belong to.
- Once this form is completed, select 'update'.

Your profile is now complete.

**Profile**

Test Test test

Profile

Security

Change Password

**Welcome**

Please complete your profile details and select the Community nearest to where you live. For more information, please refer to the Frequently Asked Questions (FAQ's) under Enterprise and Supplier Development and Community News.

Your profile has been updated successfully.

**Your Information**

Title	Address Line 1
Mr.	Address 1
Initials	Address Line 2
T	Address 2
First Name *	Address Line 3
Test	Address 3

**Community \***

Belfast  
ECC Kriel  
ECC Bethal / Hendrina  
Grootegeluk  
Leeuwpans  
Matla

your related community.

How may we contact you? Select all that apply.

☒ Email  
☒ Phone

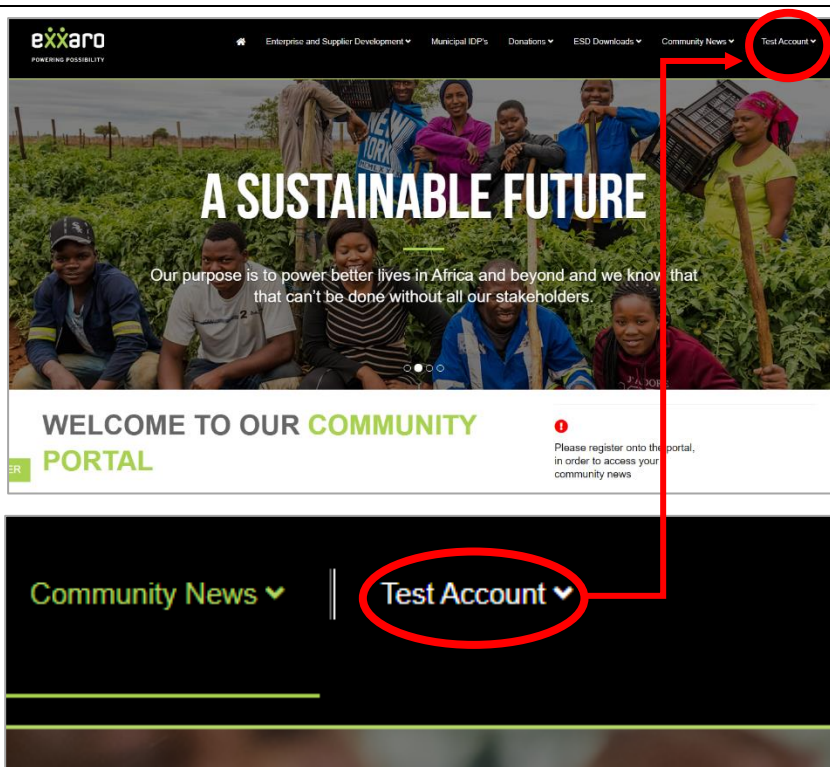
UPDATE

# EXXARO ENTERPRISE AND SUPPLIER DEVELOPMENT

## QUICK REFERENCE GUIDE: FUNDING APPLICATION PROCESS

Once your profile is complete, you will be taken back to the Community Portal home page.

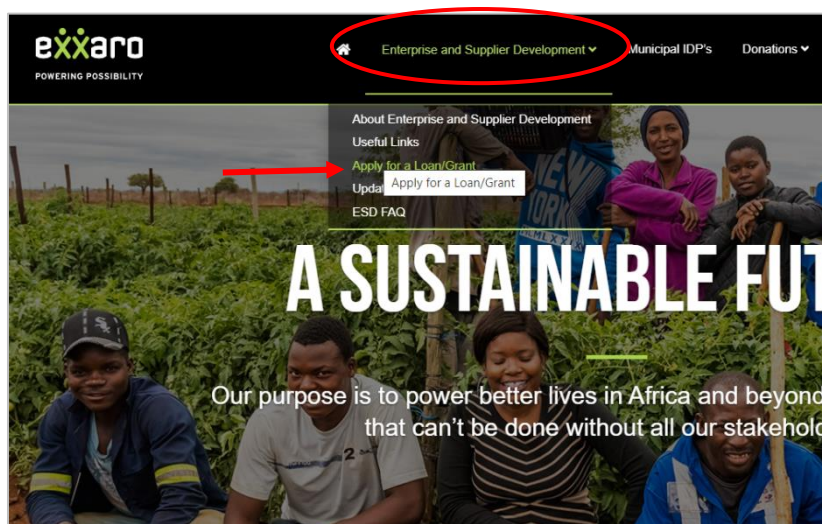
Notice, your name will appear where you would navigate to sign in. In this example the profile name is: "Test Account".



### Step 6: Applying for funding with your profile

- To apply for funding, select the 'Enterprise and Supplier Development' tab on the navigation pane.
- Select 'Apply for a loan/grant' option from the drop-down list.

You will be prompted to complete a funding application request.



# EXXARO ENTERPRISE AND SUPPLIER DEVELOPMENT

## QUICK REFERENCE GUIDE: FUNDING APPLICATION PROCESS

### Step 7: Create a funding application

Complete the funding application for a pre-qualification assessment of your loan or grant request. The below list represents the different sections of the application:

- 7.1. Business information
- 7.2. Prequalification assessment
- 7.3. Supplier development terms and conditions
- 7.4. Supplier development business information
- 7.5. Supplier development: Pre-qualification requirements
- 7.6. Supplier development: Financial support
- 7.7. Supplier development: Non-financial support
- 7.8. Supplier development: Supporting Documentation
- 7.9. Supplier development: Declaration

#### 7.1 Business information

- Company name
- Registration number
- Phone
- Mobile phone
- Email address

#### Create Loan/Grant Application

##### BUSINESS INFORMATION

BUSINESS INFORMATION	PRIMARY CONTACT
<p>Company Name *</p> <input type="text"/>	<p>Primary Contact</p> <p>Test TEST</p>
<p>Registration Nr</p> <input type="text"/>	
<p>Phone *</p> <input type="text"/>	
<p>Mobile Phone *</p> <input type="text"/>	
<p>Email *</p> <input type="text"/>	

NEXT

# EXXARO ENTERPRISE AND SUPPLIER DEVELOPMENT

## QUICK REFERENCE GUIDE: FUNDING APPLICATION PROCESS

### 7.2 Prequalification assessment

Complete the preliminary screening questions for your application.

#### Create Loan/Grant Application

11%

PRE-QUALIFICATION ASSESSMENT

Your company is classified as an Exempt Micro Enterprise or Qualifying Small Enterprise

No

Is your business at least 51% black owned? \*

No

Does your business have Black Women Ownership of more than 30%?

No

Is your company an existing registered supplier to Exxaro? \*

PREVIOUS

NEXT

### 7.3 Supplier development terms and conditions

Read and then accept the terms and conditions.

#### Create Loan/Grant Application

22%

SUPPLIER DEVELOPMENT - TERMS & CONDITIONS

Terms & Conditions Description

The supplier development application form is aimed at being a channel to the Exxaro Supplier Development Programme. Potential beneficiaries need to complete the form truthfully and to the best of their ability.

- Please read each of the questions carefully before answering
- Answer all questions on the form, and fill in all the relevant fields, where relevant
- This application form applies to Exxaro Suppliers only. If you are not an Exxaro supplier, please consider completing the Exxaro Enterprise Development Application
- Exxaro reserves the right to cancel and/or terminate this application at any time and that by submitting this application to Exxaro does not guarantee that it will be successful".

This list of documentation is required to support your application (if any of these supporting documents are not received by Exxaro, your application will be delayed). You will be required to store electronic copies of this documentation to your own Dropbox, Google Drive or iCloud and share these files with us. Include the link (URL) to the file location in the section at the end of this questionnaire.

- A one-page motivation letter to support your application (on your company letterhead); include quotes for assets/goods, if re-financing provide settlement letter
- A valid BBBEE certificate or EME/QSE Affidavit (ensure that this is not expired)
- A valid Tax Clearance Certificate (ensure that this is not expired)
- Company Profile
- Company Registration Documents (CIPC / CIPRO)
- Proposed budget showing costs
- A detailed Business Plan, i.e. project implementation plan with clear defined milestone activities and dates
- Audited Financial Statements
- Latest 3-months Management Accounts
- Certified copies of Identity Documents (required for all directors, members, partners, shareholders, etc.)
- Latest 3-months Bank Statements

Accept Terms & Conditions

No

Yes



# EXXARO ENTERPRISE AND SUPPLIER DEVELOPMENT

## QUICK REFERENCE GUIDE: FUNDING APPLICATION PROCESS

### 7.4 Supplier development business information

- Exxaro vendor number
- Relevant business unit
- Trading name
- Registered company name
- Municipality your business is located near

#### Create Loan/Grant Application

33%

##### SUPPLIER DEVELOPMENT - BUSINESS INFORMATION

Provide us with information about your business

Exxaro Vendor Number \*

Exxaro Business Unit \*

Trading Name

Registered Company Name  
TEST ACCOUNT

In which municipality is your business located? \*

PREVIOUS NEXT

### 7.5 Supplier development: Pre-qualification requirements

Complete all fields and ensure all the information is correct.

When selecting the commodity that best describes your business, select the magnifying glass icon to activate the drop down

**NB: When completing amount sections, DO NOT add the letter 'R' to indicate Rands. Only indicate the amount's decimal values.**

#### Create Loan/Grant Application

44%

##### SUPPLIER DEVELOPMENT - PRE-QUALIFICATION REQUIREMENTS

Provide us with information about your company BBBEE ownership, Diversity and Annual Turnover

What is your annual turn over? \*

What is your current annual turnover? \*

What is the black women ownership % of your business \*

What is the black youth ownership % of your business \*

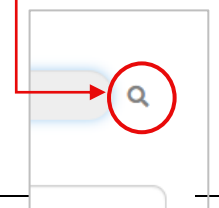
Does your business serve one of the following

Describe the products/services that you offer \*

Select the commodity best describing your business \*

How many jobs will be created? \*

PREVIOUS NEXT



# EXXARO ENTERPRISE AND SUPPLIER DEVELOPMENT

## QUICK REFERENCE GUIDE: FUNDING APPLICATION PROCESS

### 7.6 Supplier development: Financial support

Provide more information about the financial report you require.

**Note: When completing the amount section, DO NOT add the letter 'R' to indicate Rands. Only indicate the amount's decimal values.**

### Create Loan/Grant Application

55%

SUPPLIER DEVELOPMENT - FINANCIAL SUPPORT

Provide more information about the Financial support that you need.

Fund Type \*

Loan

Does your entity need funding?

Yes

If yes to the above, how much do you require?

What will the money be used for?

Asset Finance

How much revenue will your business generate? \*

PREVIOUS

NEXT

### 7.7 Supplier development: Non-financial support

Provide more information about the non-financial report you require. This includes indicating if you need mentoring, training, skill training and operational business support.

### Create Loan/Grant Application

60%

SUPPLIER DEVELOPMENT - NON-FINANCIAL SUPPORT

Provide more information about the Non-Financial support that you need.

Do you need a mentor to assist?

No

What type of mentorship do you need?

Do you need formal business management training?

No

What training do you need? (1st priority)

What training do you need? (2nd priority)

What training do you need? (3rd priority)

Do you need operational business support?

No

What operational business support do you need? 1st

What operational business support do you need? 2nd

What operational business support do you need? 3rd

Do you need technical skills training?

No

What technical skills do you require?

PREVIOUS

NEXT



# EXXARO ENTERPRISE AND SUPPLIER DEVELOPMENT

## QUICK REFERENCE GUIDE: FUNDING APPLICATION PROCESS

### Step 7.8: Submission of supporting documents

All applicants are required to store electronic copies of the above-mentioned documents on their personal Dropbox, Google Drive or iCloud. Provide the link to the folder containing the required documents in the URL space.

There are links available to assist with creating drive storage if you do not have a Dropbox, Google Drive or iCloud set up.

For guidance see video <https://www.youtube.com/watch?v=cCZj5ojxRAA>

**Note: Applications without ALL supporting documents in the above-mentioned list will not be considered.**

### Create Loan/Grant Application

77%

#### SUPPLIER DEVELOPMENT - SUPPORTING DOCUMENTATION

##### Description Supporting Documentation

This list of documentation is required to support your application (if any of these supporting documents are not received by Exxaro, your application will be delayed). You will be required to store electronic copies of this documentation to your own Dropbox, Google Drive or iCloud and share these files with us. Include the link (URL) below:

- A one-page motivation letter to support your application (on your company letterhead); include quotes for assets/goods. If re-financing provide settlement letter
- A valid BBBEE certificate or EME/QSE Affidavit
- A valid Tax Clearance Certificate
- Company Profile
- Company Registration Documents (CIPC / CIPRO)
- Proposed budget showing costs
- A detailed Business Plan, i.e. project implementation plan with clear defined milestone activities and dates
- Audited Financial Statements
- Latest 3-months Management Accounts
- Certified copies of Identity Documents (required for all directors, members, partners, shareholders, etc.)
- Latest 3-months Bank Statements
- Summary of existing contracts with Exxaro and other customers (include customer name, contract term & value)

Enter URL for your Supporting Documentation \*

If you do not have a onedrive account, click on the following link:

<https://onedrive.live.com/about/en-US/>

If you do not have a google drive account, click on the following link:

<https://www.google.com/drive/>

PREVIOUS NEXT

### 7.9 Supplier development: Declaration

Read and complete the fields below the declaration statement.

To complete the 'date' field, select the calendar icon on the right end of the field.

### Create Loan/Grant Application

88%

#### SUPPLIER DEVELOPMENT - DECLARATION

##### Declaration Description

I hereby acknowledge that:  
- the information furnished in this application is true and correct  
- any conflict of interest will be declared in writing (applicant to declare this to an Exxaro SCM Official)

Note: Exxaro reserves the right to confirm the information submitted in response to this process with relevant third party organizations, including credit rating and criminal record checking on relevant entities, and the applicant/s consent to this.

Contact

Test TEST

Designation \*

Date \*

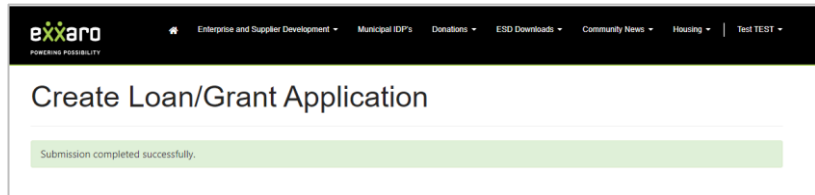
PREVIOUS SUBMIT

# EXXARO ENTERPRISE AND SUPPLIER DEVELOPMENT

## QUICK REFERENCE GUIDE: FUNDING APPLICATION PROCESS

### Step 8: Application Completion

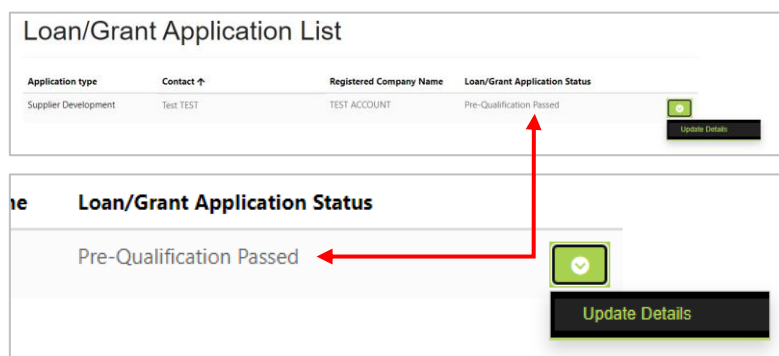
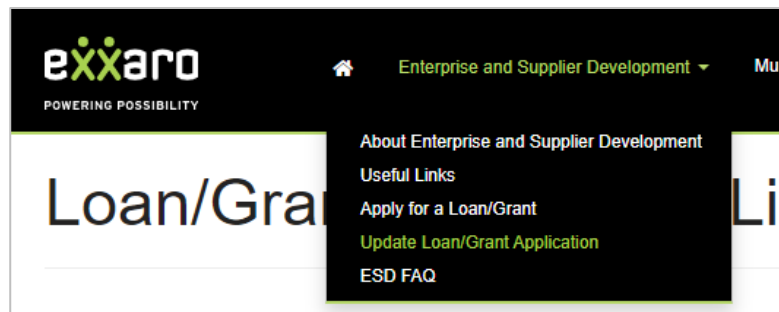
Once you submit the declaration, your application is now complete



If you have more than one application or would like to view your applications list:

- Select 'Enterprise and Supplier Development';
- Select 'Update loan/grant application';

You can review the list of applications on your profile by selecting the drop-down arrow on each application row to update any details if necessary.



# EXXARO ENTERPRISE AND SUPPLIER DEVELOPMENT

## QUICK REFERENCE GUIDE: FUNDING APPLICATION PROCESS

For any enquiries related to the ESD funding:

[esd@exxaro.com](mailto:esd@exxaro.com)

012 307 4008

087 283 9704