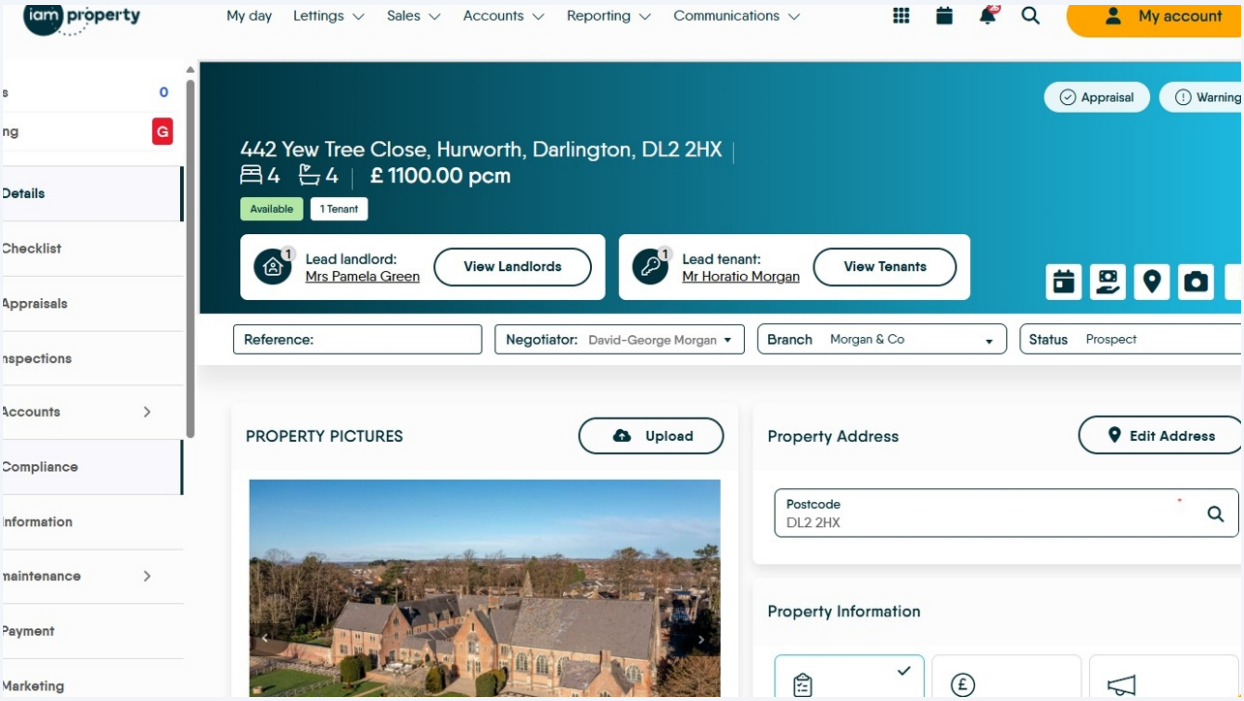
Adding the EPC Rating and Certificate in CRM

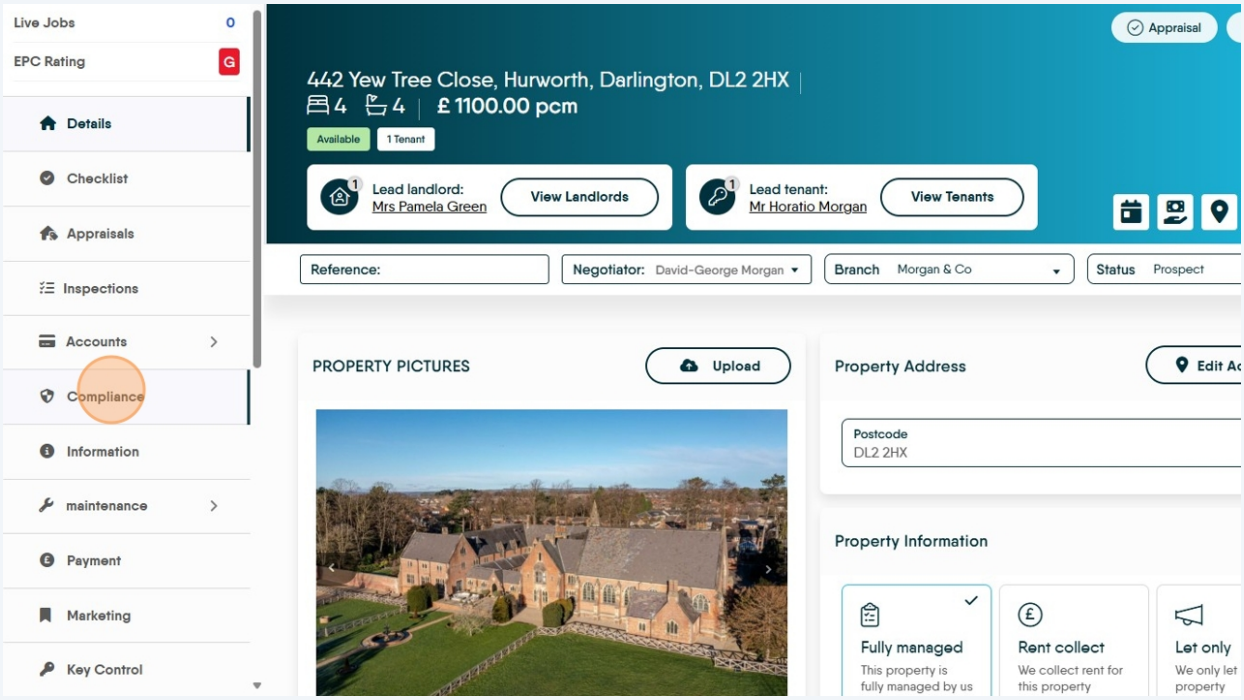
This guide provides a step-by-step process for adding an Energy Performance Certificate (EPC) rating and certificate to your CRM system.

It streamlines compliance management for property listings, ensuring you meet regulatory standards efficiently. Following these instructions can help enhance your property's appeal and marketability by showcasing its energy efficiency. Viewing this guide will save you time and ensure accuracy in your compliance documentation.

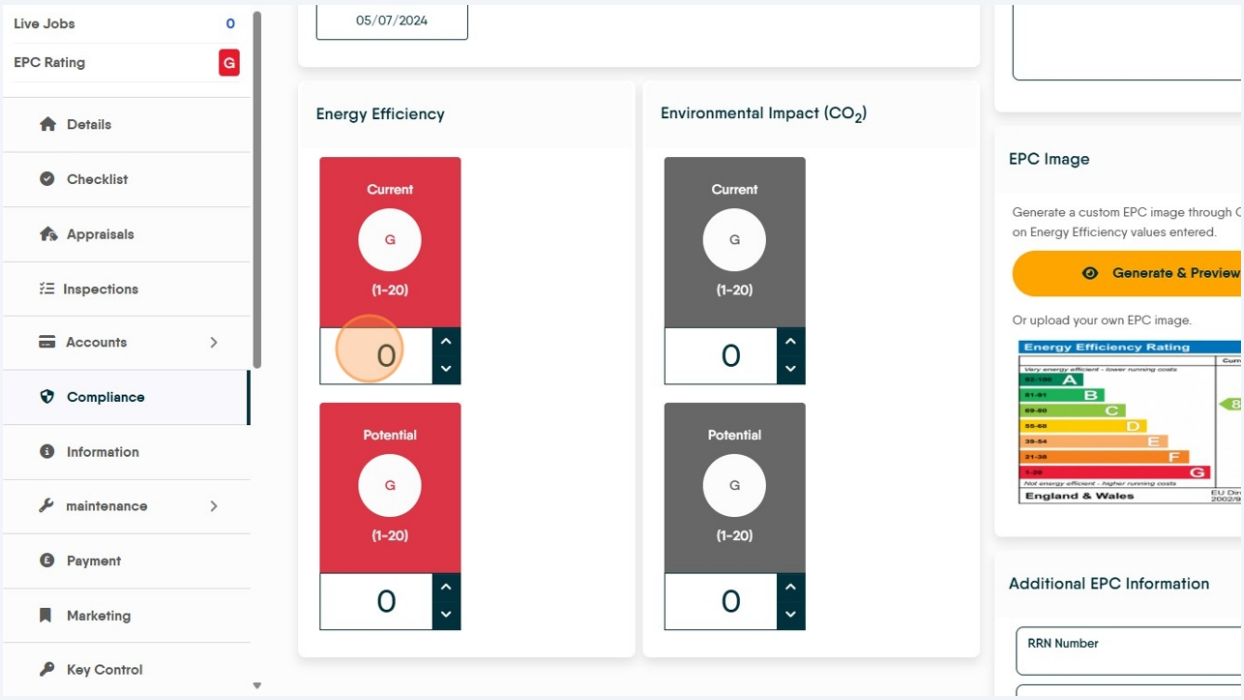
1 Navigate to the property record you are adding the EPC to



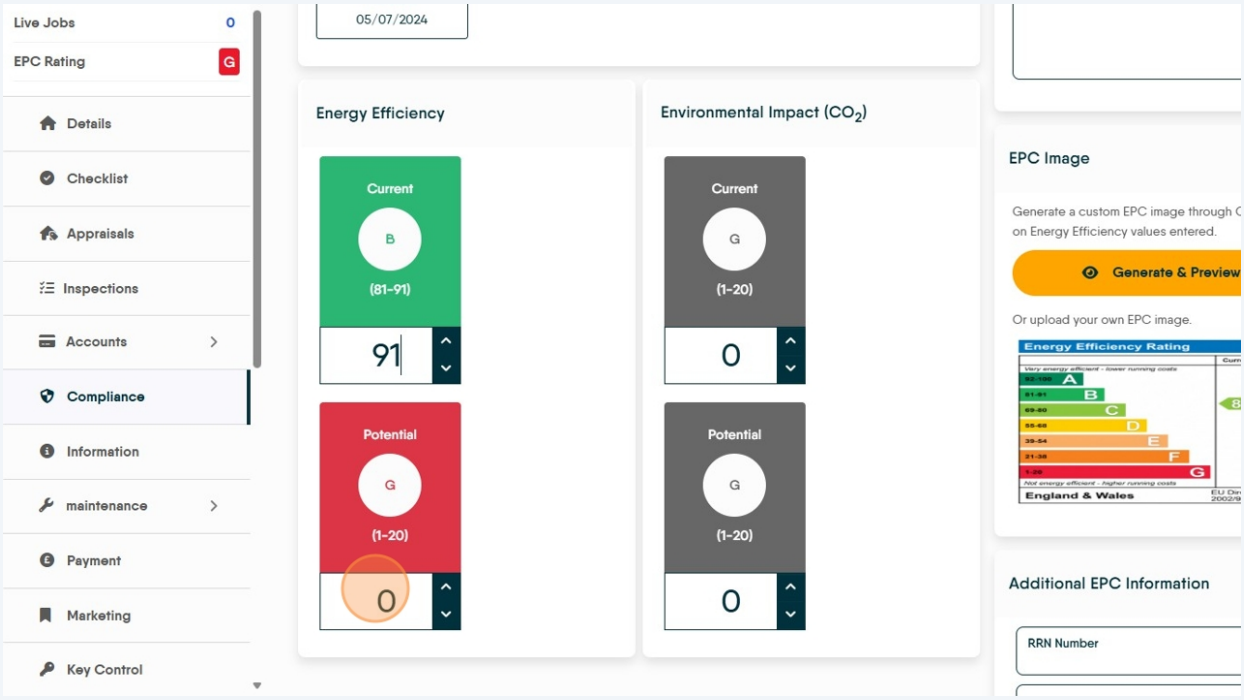
2 Click "Compliance"



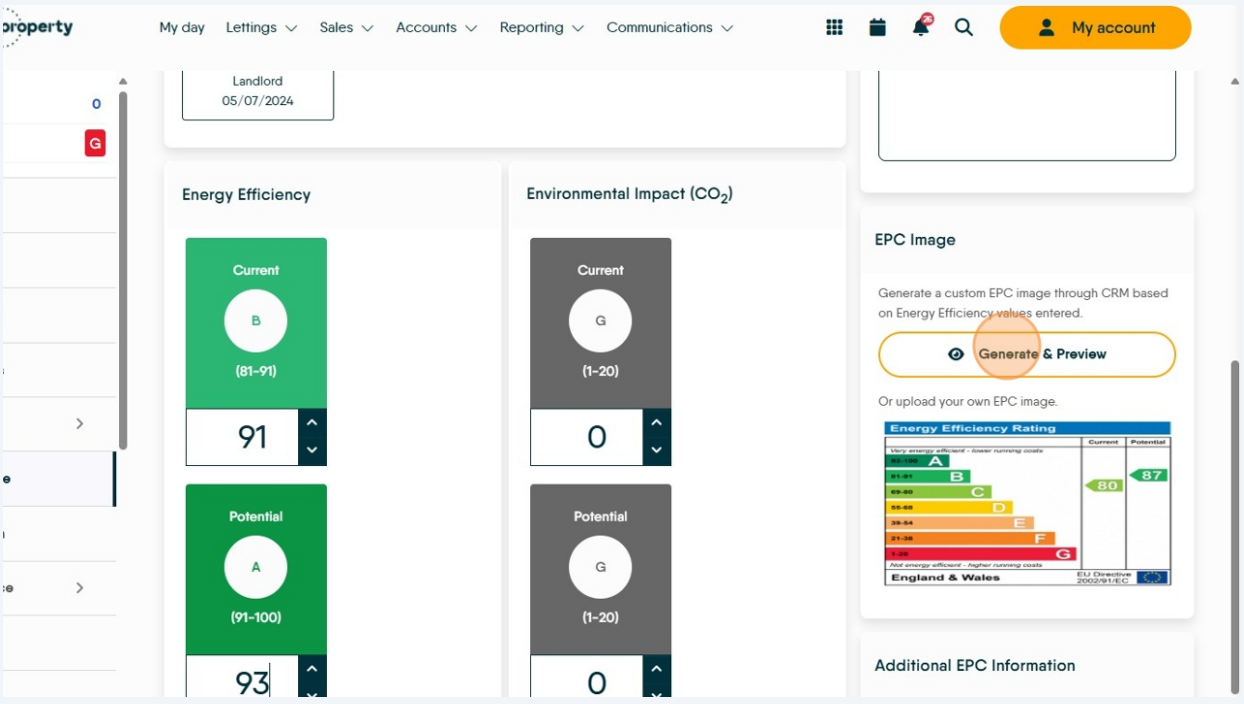
3 Click here and add the Current EPC rating.



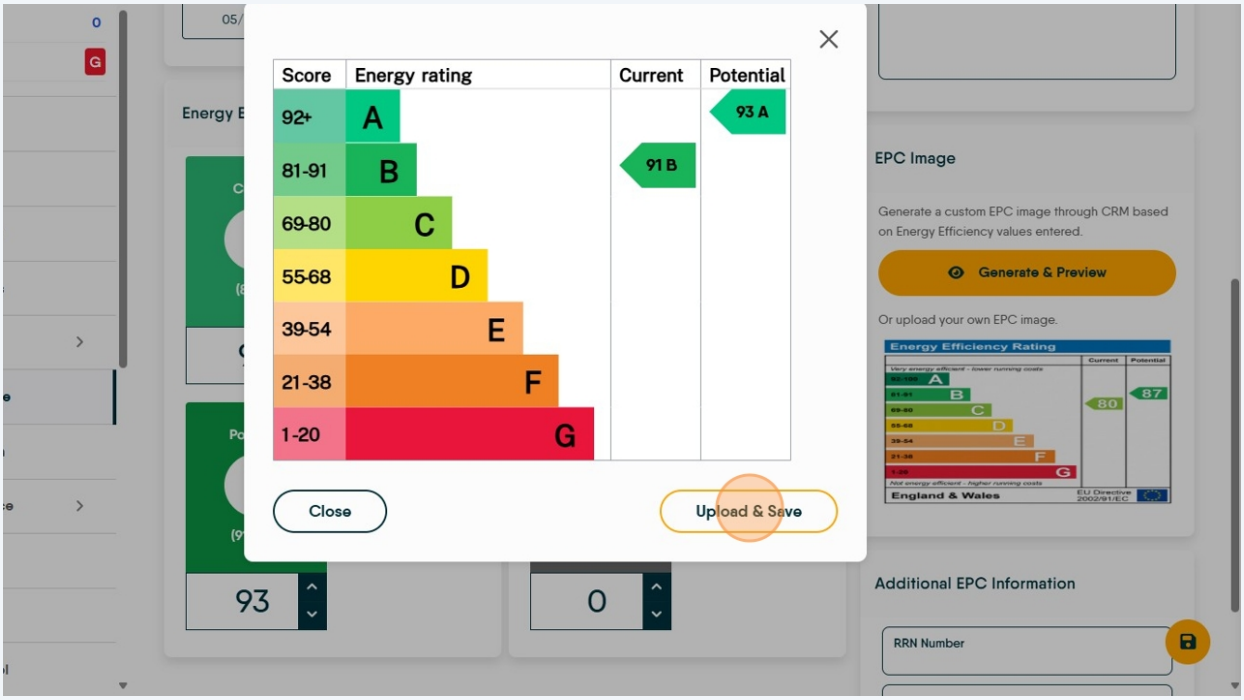
4 Click here and add the Potential EPC rating



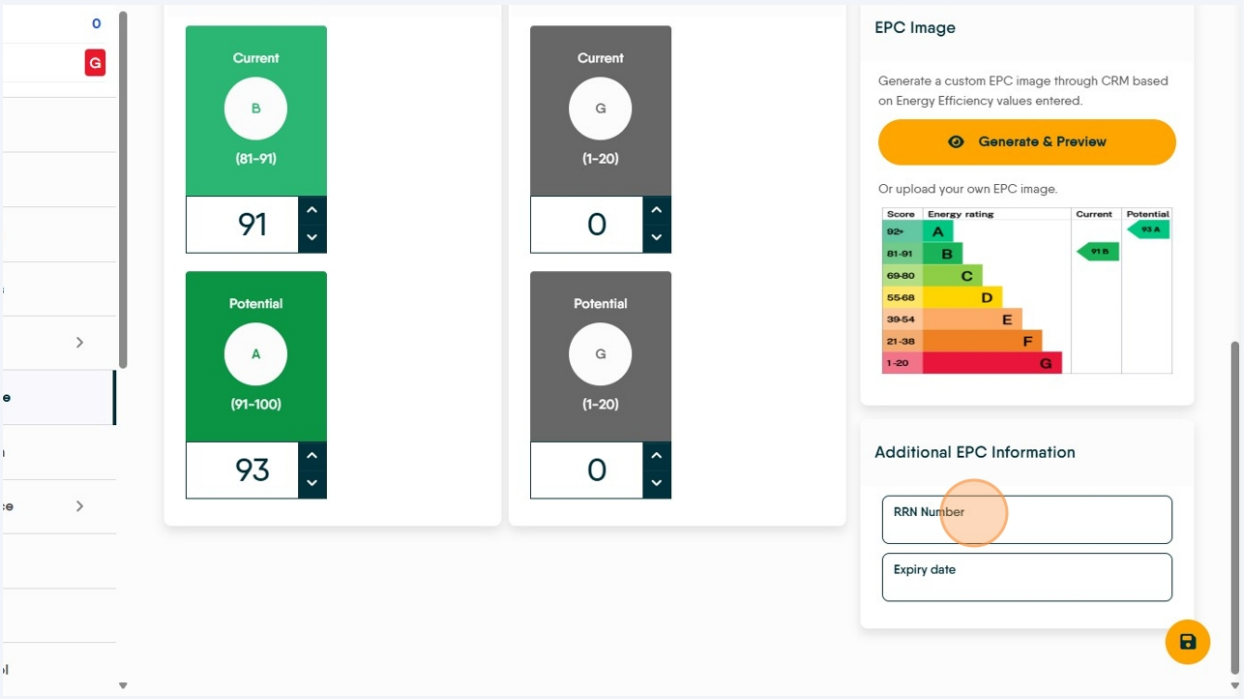
5 Click "Generate & Preview" this will create the EPC graph. If an EPC is already created for the property and you are updating it, follow the same process as above and a new graph will be created to replace the current one.



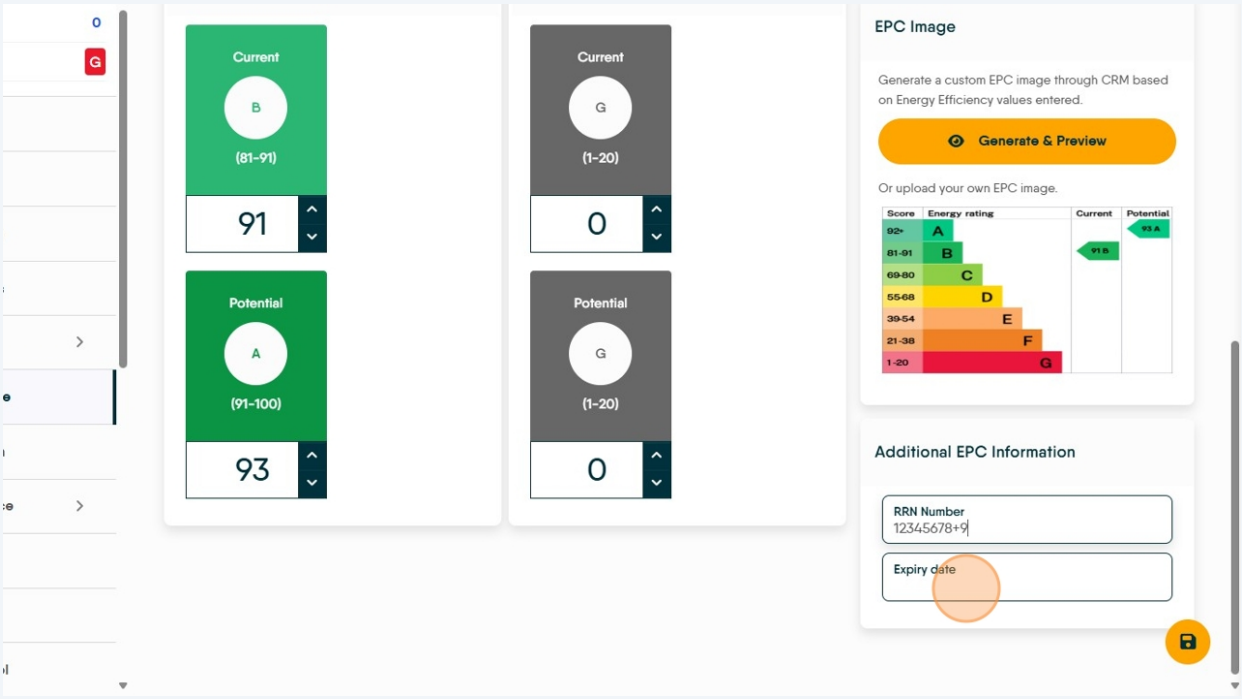
6 Click "Upload & Save"



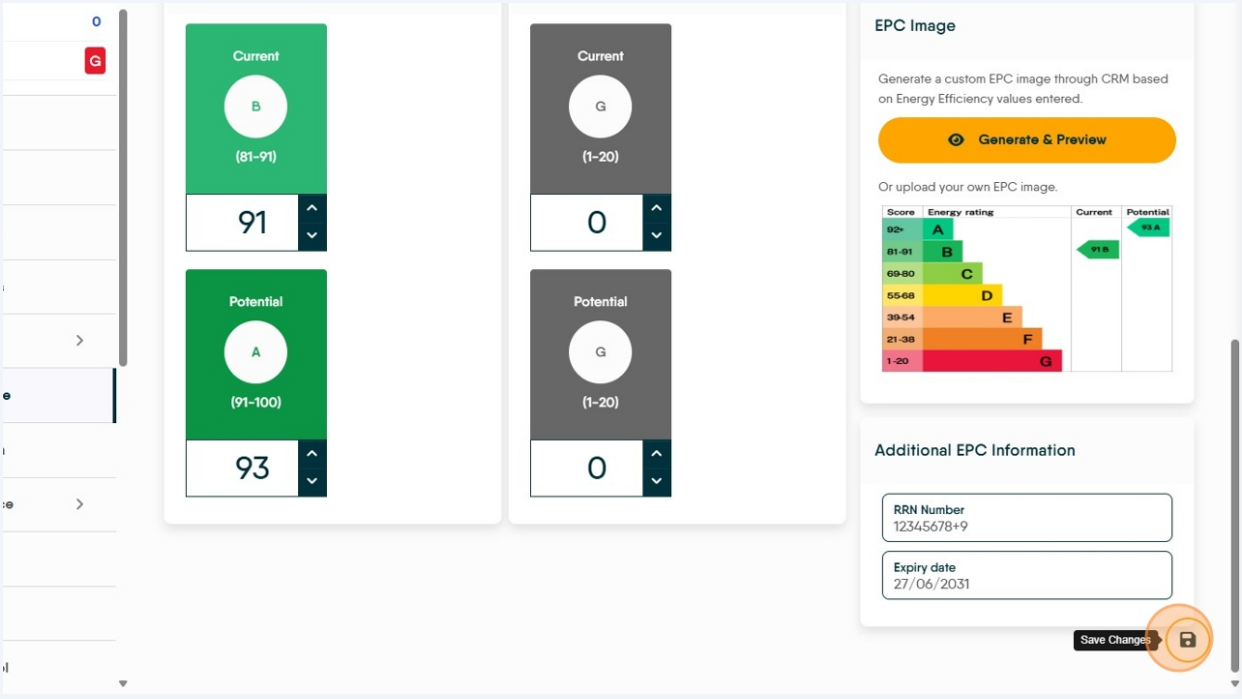
7 Click this text field to add the certificate number.



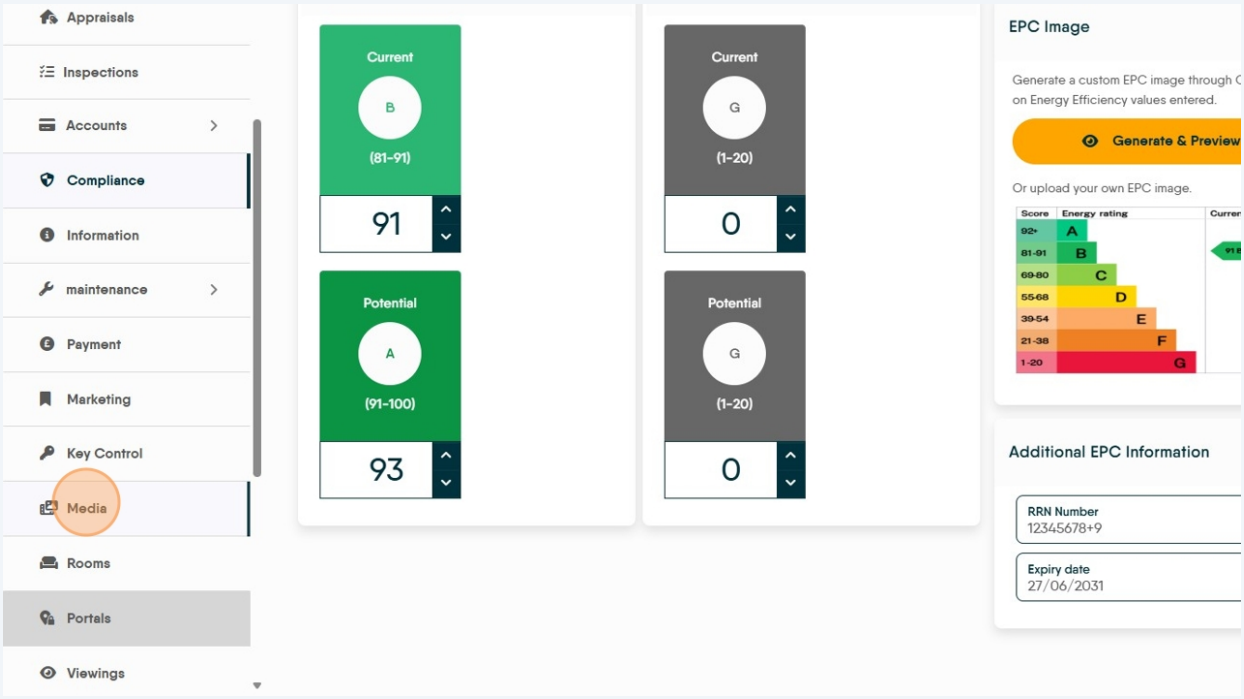
8 Click this text field to add the EPC expiry date.

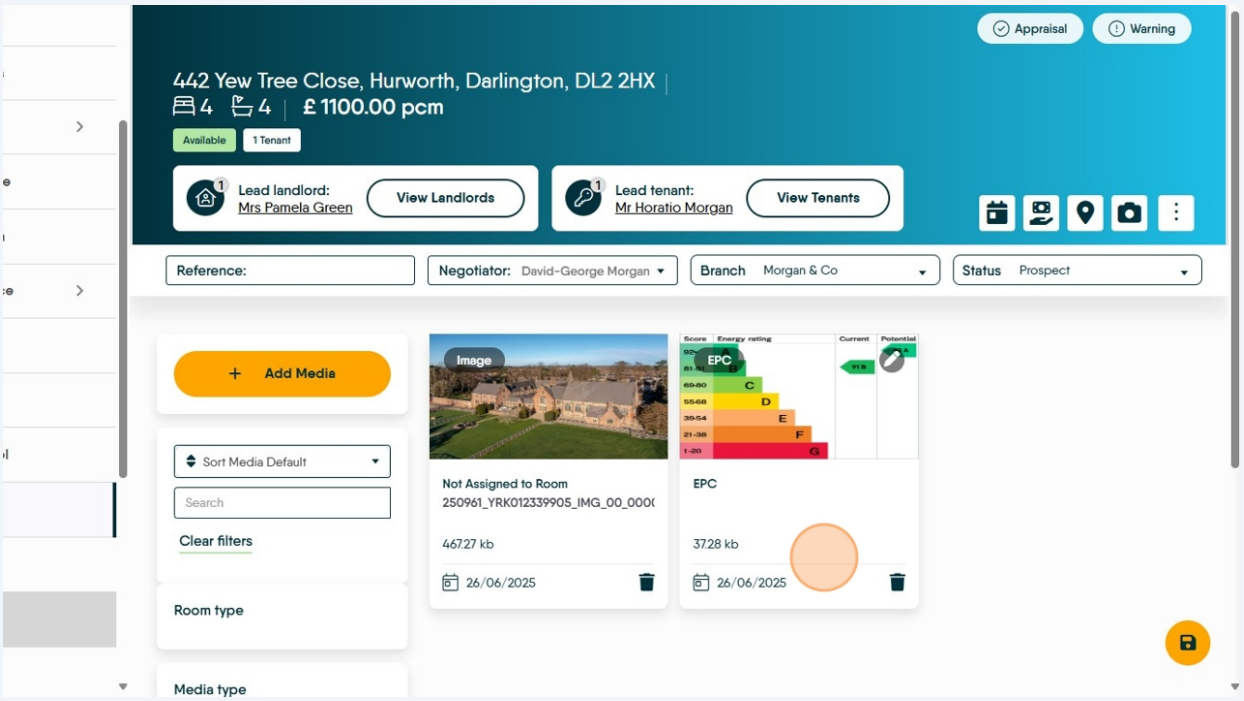


9 Click here to Save the new EPC.

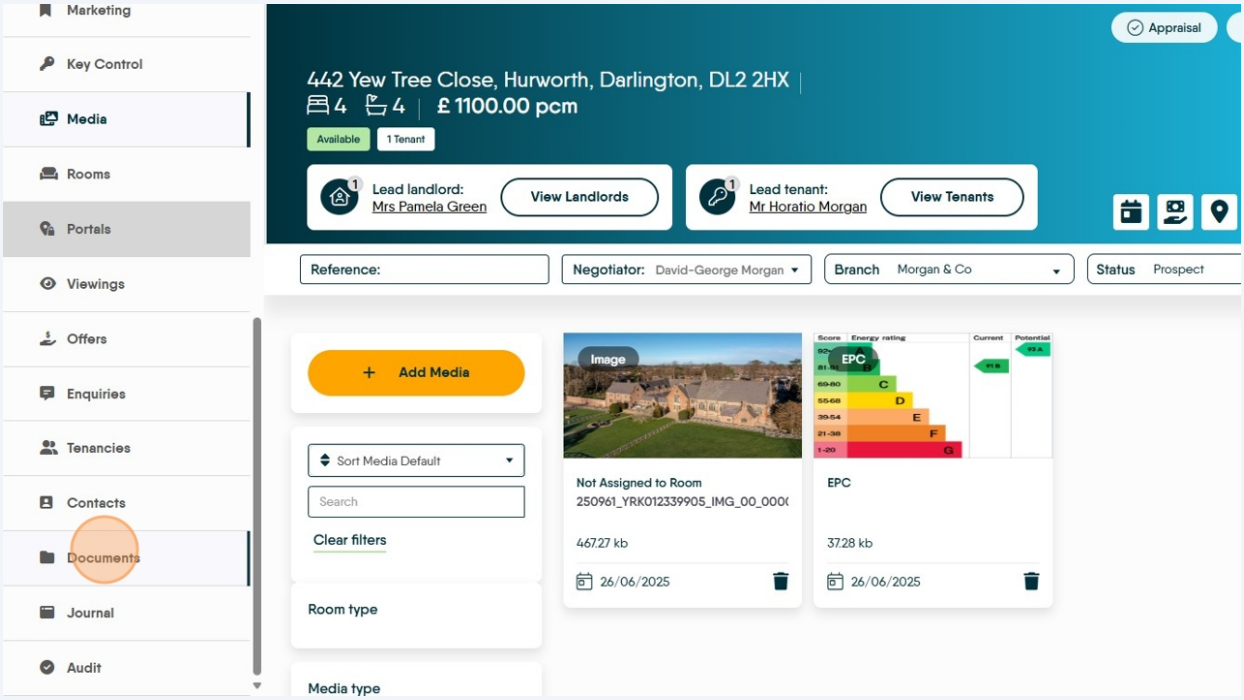
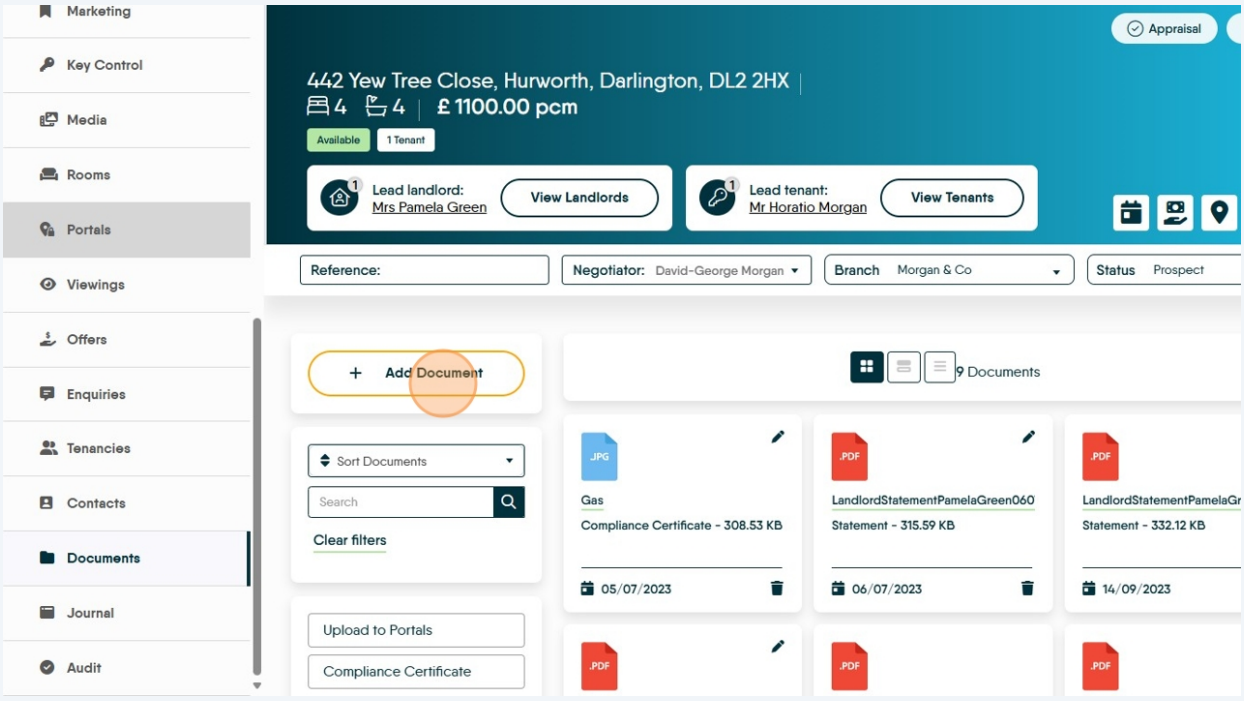


10 The EPC graph will be automatically added to the Media folder. Click "Media" to view





11 To add a copy of the certificate to the property record, click "Documents".



12 Click "Add Document" then search for and add the document to CRM