

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

The screenshot shows the 'iam property' CRM interface. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', 'Communications', and 'My account'. The left sidebar lists various modules: Details, Checklist, Appraisals, Inspections, Accounts, Compliance, Information, Maintenance, Payment, and Marketing. The main content area displays a property record for '442 Yew Tree Close, Hurworth, Darlington, DL2 2HX'. The property is marked as 'Available' and has '1 Tenant'. The lead landlord is 'Mrs Pamela Green' and the lead tenant is 'Mr Horatio Morgan'. The status is 'Prospect'. The interface also shows a 'PROPERTY PICTURES' section with an 'Upload' button and a 'Property Address' section with an 'Edit Address' button. The 'Property Information' section is partially visible at the bottom.

2 Click "Compliance"

Live Jobs 0

EPC Rating G

Details

Checklist

Appraisals

Inspections

Accounts >

Compliance

Information

Maintenance >

Payment

Marketing

Key Control

Appraisal

442 Yew Tree Close, Hurworth, Darlington, DL2 2HX |
4 4 | £ 1100.00 pcm

Available 1 Tenant

Lead landlord: Mrs Pamela Green View Landlords

Lead tenant: Mr Horatio Morgan View Tenants

Reference: Negotiator: David-George Morgan Branch: Morgan & Co Status: Prospect

PROPERTY PICTURES Upload

Property Address Edit Address

Postcode DL2 2HX

Property Information

Fully managed ☒ This property is fully managed by us

Rent collect ☐ We collect rent for this property

Let only ☐ We only let property

3 Click here and add the Current EPC rating.

05/07/2024

Energy Efficiency

Current G (1-20)

Potential G (1-20)

Environmental Impact (CO₂)

Current G (1-20)

Potential G (1-20)

EPC Image

Generate a custom EPC image through C on Energy Efficiency values entered.

Generate & Preview

Or upload your own EPC image.

Energy Efficiency Rating

Very energy efficient - lower running costs

A B C D E F G

England & Wales

Additional EPC Information

RRN Number

4 Click here and add the Potential EPC rating

Live Jobs 0

EPC Rating G

Details

Checklist

Appraisals

Inspections

Accounts >

Compliance

Information

Maintenance >

Payment

Marketing

Key Control

05/07/2024

Energy Efficiency

Current

B

(81-91)

91

Potential

G

(1-20)

0

Environmental Impact (CO₂)

Current

G

(1-20)

0

Potential

G

(1-20)

0

EPC Image

Generate a custom EPC image through CRM based on Energy Efficiency values entered.

Generate & Preview

Or upload your own EPC image.

Energy Efficiency Rating

Rating	Score Range
A	92-100
B	81-91
C	69-80
D	55-68
E	39-54
F	21-38
G	1-20

England & Wales

EU Directive 2002/91/EC

Additional EPC Information

RRN Number

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.

property

My day Lettings Sales Accounts Reporting Communications

My account

Landlord

05/07/2024

Energy Efficiency

Current

B

(81-91)

91

Potential

A

(91-100)

93

Environmental Impact (CO₂)

Current

G

(1-20)

0

Potential

G

(1-20)

0

EPC Image

Generate a custom EPC image through CRM based on Energy Efficiency values entered.

Generate & Preview

Or upload your own EPC image.

Energy Efficiency Rating

Rating	Score Range	Current	Potential
A	92-100		
B	81-91		
C	69-80		
D	55-68		
E	39-54		
F	21-38		
G	1-20		

England & Wales

EU Directive 2002/91/EC

Additional EPC Information

RRN Number

6 Click "Upload & Save"

The screenshot shows a web interface for uploading an EPC. A modal window is open, displaying a table of energy ratings and scores. The table has four columns: Score, Energy rating, Current, and Potential. The 'Current' column shows a green arrow pointing to '91 B'. The 'Potential' column shows a green arrow pointing to '93 A'. The 'Energy rating' column shows a green arrow pointing to 'A'. The 'Score' column shows a green arrow pointing to '92+'. The 'Current' and 'Potential' columns have dropdown menus. The 'Energy rating' column has a dropdown menu. The 'Score' column has a dropdown menu. The modal has 'Close' and 'Upload & Save' buttons.

Score	Energy rating	Current	Potential
92+	A		93 A
81-91	B	91 B	
69-80	C		
55-68	D		
39-54	E		
21-38	F		
1-20	G		

Close Upload & Save

EPC Image

Generate a custom EPC image through CRM based on Energy Efficiency values entered.

Generate & Preview

Or upload your own EPC image.

Energy Efficiency Rating

Score	Energy rating	Current	Potential
92+	A		93 A
81-91	B	91 B	
69-80	C		
55-68	D		
39-54	E		
21-38	F		
1-20	G		

England & Wales EU Directive 2002/91/EC

Additional EPC Information

RRN Number

7 Click this text field to add the certificate number.

The screenshot shows the EPC upload interface. On the left, there are two columns for 'Current' and 'Potential' energy ratings. The 'Current' column shows a green circle with 'B' and a score of '91'. The 'Potential' column shows a green circle with 'A' and a score of '93'. On the right, there is a section for 'EPC Image' with a 'Generate & Preview' button. Below this is a section for 'Additional EPC Information' with text fields for 'RRN Number' and 'Expiry date'. The 'RRN Number' field is highlighted with an orange circle.

Current

B (81-91)

91

Potential

A (91-100)

93

EPC Image

Generate a custom EPC image through CRM based on Energy Efficiency values entered.

Generate & Preview

Or upload your own EPC image.

Energy Efficiency Rating

Score	Energy rating	Current	Potential
92+	A		93 A
81-91	B	91 B	
69-80	C		
55-68	D		
39-54	E		
21-38	F		
1-20	G		

England & Wales EU Directive 2002/91/EC

Additional EPC Information

RRN Number

Expiry date

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

The screenshot shows a web form for generating an EPC. On the left, there are two columns of energy efficiency ratings. The first column has a 'Current' rating of 'B' (81-91) and a 'Potential' rating of 'A' (91-100). The second column has a 'Current' rating of 'G' (1-20) and a 'Potential' rating of 'G' (1-20). On the right, the 'EPC Image' section includes a 'Generate & Preview' button and a table showing the energy rating scale. Below this, the 'Additional EPC Information' section contains fields for 'RRN Number' (12345678+9) and 'Expiry date', with the latter highlighted by an orange circle.

Score	Energy rating
92+	A
81-91	B
69-80	C
55-68	D
39-54	E
21-38	F
1-20	G

Current: B (81-91) Potential: A (91-100)

Current: G (1-20) Potential: G (1-20)

RRN Number: 12345678+9

Expiry date

9 Click here to Save the new EPC.

The screenshot shows the same EPC form as in step 8. The 'Expiry date' field in the 'Additional EPC Information' section now contains the date '27/06/2031'. At the bottom right of the form, a 'Save Changes' button is highlighted by an orange circle.

Score	Energy rating
92+	A
81-91	B
69-80	C
55-68	D
39-54	E
21-38	F
1-20	G

Current: B (81-91) Potential: A (91-100)

Current: G (1-20) Potential: G (1-20)

RRN Number: 12345678+9

Expiry date: 27/06/2031

Save Changes

10

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

Appraisals
Inspections
Accounts
Compliance
Information
Maintenance
Payment
Marketing
Key Control
Media
Rooms
Portals
Viewings

Current

B

(81-91)

91

Potential

A

(91-100)

93

Current

G

(1-20)

0

Potential

G

(1-20)

0

EPC Image

Generate a custom EPC image through C on Energy Efficiency values entered.

Generate & Preview

Or upload your own EPC image.

Score	Energy rating	Current
92+	A	
81-91	B	91
69-80	C	
55-68	D	
39-54	E	
21-38	F	
1-20	G	

Additional EPC Information

RRN Number

12345678+9

Expiry date

27/06/2031

Appraisal
Warning

442 Yew Tree Close, Hurworth, Darlington, DL2 2HX |
4 4 | £ 1100.00 pcm
Available 1 Tenant

Lead landlord:
Mrs Pamela Green View Landlords

Lead tenant:
Mr Horatio Morgan View Tenants

Reference: Negotiator: David-George Morgan Branch Morgan & Co Status Prospect

Add Media

Sort Media Default

Search

Clear filters

Room type

Media type

Image

Not Assigned to Room
250961_YRK012339905_IMG_00_000X
46727 kb
26/06/2025

EPC

Score Energy rating
92+ A
81-91 B
69-80 C
55-68 D
39-54 E
21-38 F
1-20 G
Current Potential
3728 kb
26/06/2025

6

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

The screenshot shows the CRM interface for property 442 Yew Tree Close, Hurworth, Darlington, DL2 2HX. The sidebar on the left has the 'Documents' tab highlighted. The main content area shows a list of documents. The first document is an image titled 'Not Assigned to Room' with a file name '250961_YRK012339905_IMG_00_000'. The second document is an EPC certificate titled 'EPC' with a file name '250961_YRK012339905_IMG_00_000'. The interface includes a sidebar with navigation options: Marketing, Key Control, Media, Rooms, Portals, Viewings, Offers, Enquiries, Tenancies, Contacts, Documents, Journal, and Audit. The main header shows the property address, status (Available), and tenant information (Lead landlord: Mrs Pamela Green, Lead tenant: Mr Horatio Morgan). The main content area has a search bar, a 'Sort Media Default' dropdown, and a 'Clear filters' button. The document list shows the file name, size (467.27 kb and 37.28 kb), and date (26/06/2025).

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

The screenshot shows the CRM interface for property 442 Yew Tree Close, Hurworth, Darlington, DL2 2HX. The sidebar on the left has the 'Documents' tab highlighted. The main content area shows a list of documents. The first document is a Gas Compliance Certificate titled 'Gas Compliance Certificate - 308.53 KB' with a file name '250961_YRK012339905_IMG_00_000'. The second document is a Landlord Statement titled 'LandlordStatementPamelaGreen060' with a file name '250961_YRK012339905_IMG_00_000'. The third document is a Landlord Statement titled 'LandlordStatementPamelaGr' with a file name '250961_YRK012339905_IMG_00_000'. The interface includes a sidebar with navigation options: Marketing, Key Control, Media, Rooms, Portals, Viewings, Offers, Enquiries, Tenancies, Contacts, Documents, Journal, and Audit. The main header shows the property address, status (Available), and tenant information (Lead landlord: Mrs Pamela Green, Lead tenant: Mr Horatio Morgan). The main content area has a search bar, a 'Sort Documents' dropdown, and a 'Clear filters' button. The document list shows the file name, size (308.53 KB, 315.59 KB, and 332.12 KB), and date (05/07/2023, 06/07/2023, and 14/09/2023).