

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

My day Lettings Sales Accounts Reporting Communications

Appraisal Warning

442 Yew Tree Close, Hurworth, Darlington, DL2 2HX | G 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

Postcode DL2 2HX Edit Address

Property Information

1

2 Click "Compliance"

Live Jobs 0

EPC Rating G

Details

Checklist

Appraisals

Inspections

Accounts

Compliance (highlighted)

Information

maintenance

Payment

Marketing

Key Control

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

Available 1 Tenant

Lead landlord: Mrs Pamela Green | View Landlords

Lead tenant: Mr Horatio Morgan | View Tenants

Appraisal

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.

Live Jobs 0

EPC Rating G

Details

Checklist

Appraisals

Inspections

Accounts

Compliance (highlighted)

Information

maintenance

Payment

Marketing

Key Control

05/07/2024

05/07/2024

Energy Efficiency

Current: G (1-20) Value: 0

Potential: G (1-20) Value: 0

Environmental Impact (CO₂)

Current: G (1-20) Value: 0

Potential: G (1-20) Value: 0

EPC Image

Generate a custom EPC image through Current Energy Efficiency values entered.

Generate & Preview

Or upload your own EPC image.

Energy Efficiency Rating

Rating	Score
A	80-100
B	61-79
C	50-60
D	39-49
E	21-38
F	1-20
G	1-20

Additional EPC Information

RRN Number

4 Click here and add the Potential EPC rating

Live Jobs 0

05/07/2024

EPC Rating G

Details

Checklist

Appraisals

Inspections

Accounts >

Compliance

Information

mantenance >

Payment

Marketing

Key Control

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	Notes
A	90-100	Very energy efficient - lower running costs
B	81-89	
C	69-80	
D	55-68	
E	39-54	
F	21-38	
G	1-20	Not energy efficient - higher running costs

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

EPC Rating G

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.

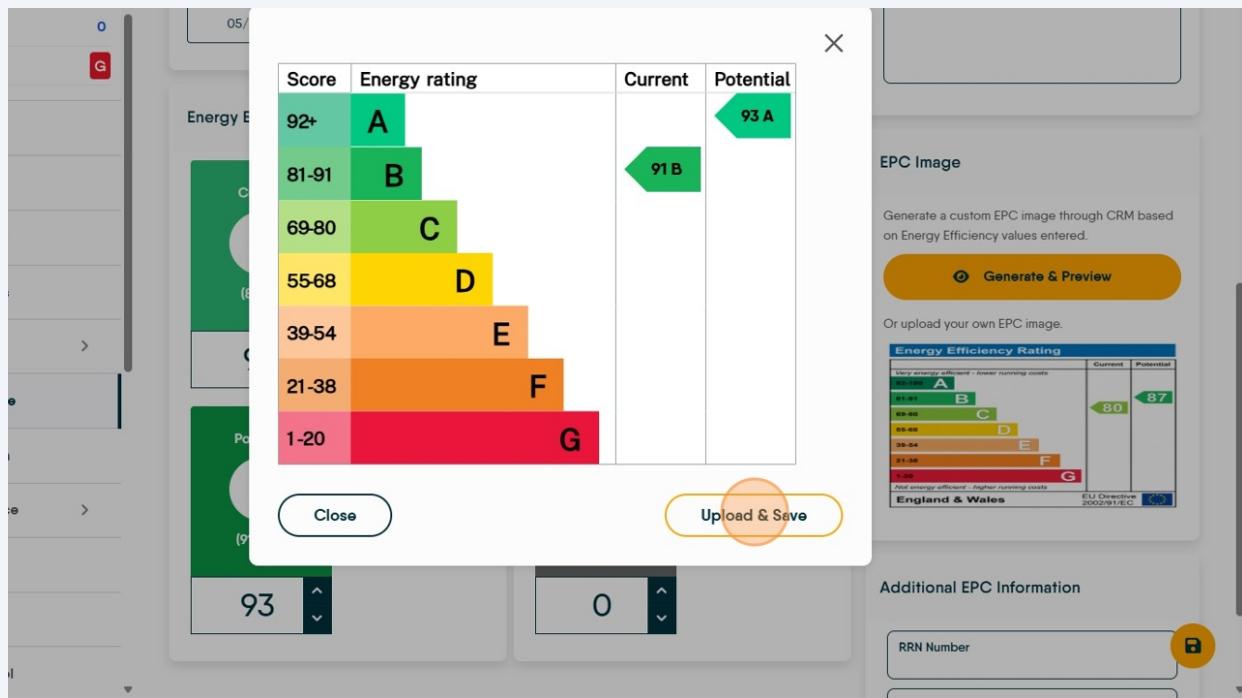
Energy Efficiency Rating

Rating	Score	Notes
A	90-100	Very energy efficient - lower running costs
B	81-89	
C	69-80	
D	55-68	
E	39-54	
F	21-38	
G	1-20	Not energy efficient - higher running costs

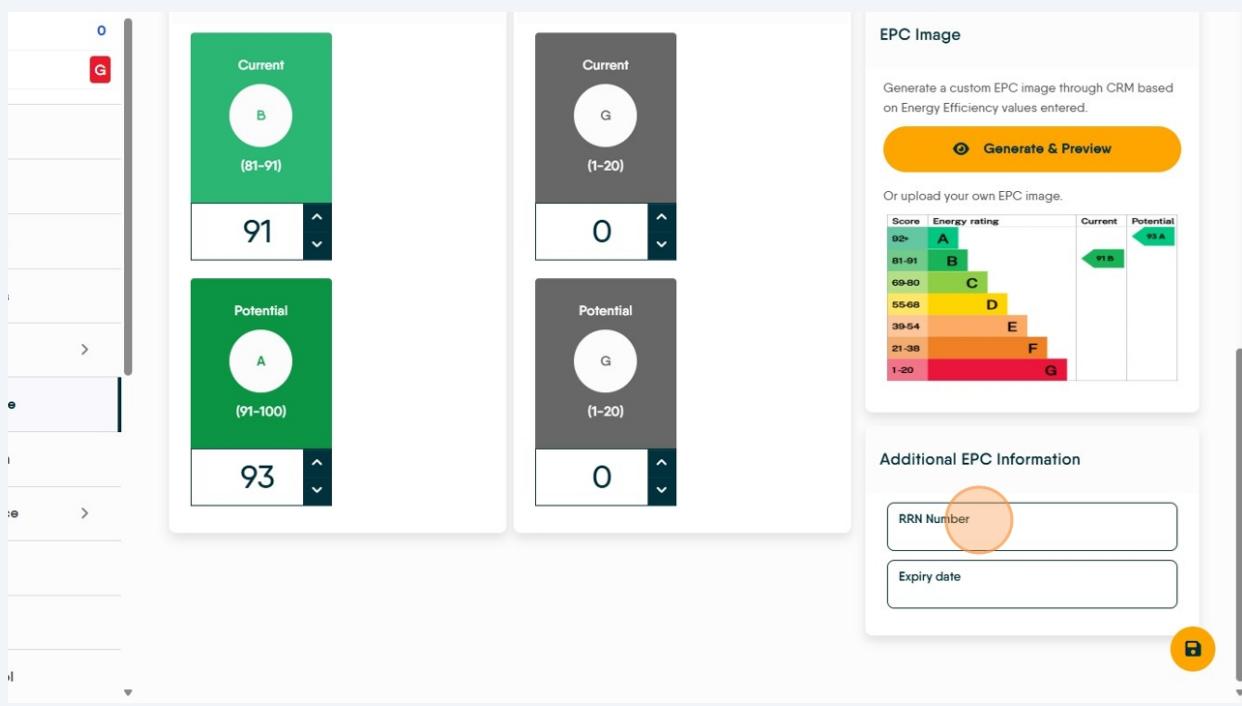
England & Wales EU Directive 2002/91/EC

Additional EPC Information

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.

0 G

Current
B
(81-91)

91

Current
G
(1-20)

0

Potential
A
(91-100)

93

Potential
G
(1-20)

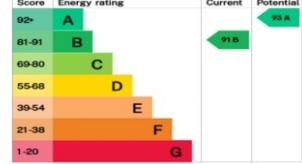
0

EPC Image

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

Generate & Preview

Or upload your own EPC image.



Additional EPC Information

RRN Number

Expiry date

Save

9 Click here to Save the new EPC.

0 G

Current
B
(81-91)

91

Current
G
(1-20)

0

Potential
A
(91-100)

93

Potential
G
(1-20)

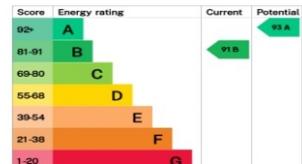
0

EPC Image

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

Generate & Preview

Or upload your own EPC image.



Additional EPC Information

RRN Number

Expiry date

Save Changes

10

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

The screenshot displays a software interface for property management, specifically focusing on energy efficiency and property details.

Left Sidebar: A vertical sidebar on the left contains the following menu items:

- Appraisals
- Inspections
- Accounts >
- Compliance
- Information
- maintenance >
- Payment
- Marketing
- Key Control
- Media (highlighted with an orange circle)
- Rooms
- Portals
- Viewings

EPC Image Section: This section shows current and potential energy ratings for a property. It includes a color-coded legend for energy ratings (A-G) based on scores (92+ to 1-20).

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

Additional EPC Information: This section includes fields for the RRN Number (123456789) and Expiry date (27/06/2031).

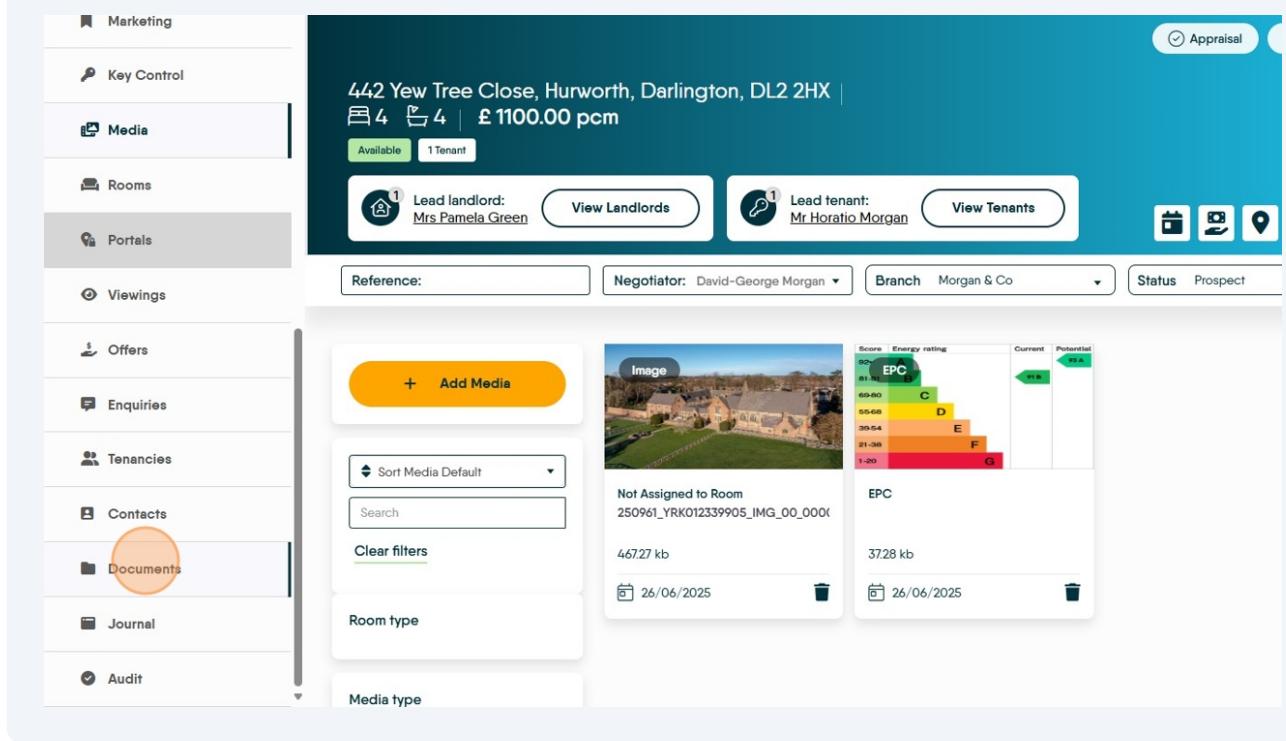
Property Details: The main content area shows details for property 442 Yew Tree Close, Hurworth, Darlington, DL2 2HX. It lists 4 bedrooms, 4 bathrooms, and a price of £1100.00 pcm. It also indicates the property is available and has 1 tenant.

Lead Landlord: Mrs Pamela Green (1 notification)

Lead Tenant: Mr Horatio Morgan (1 notification)

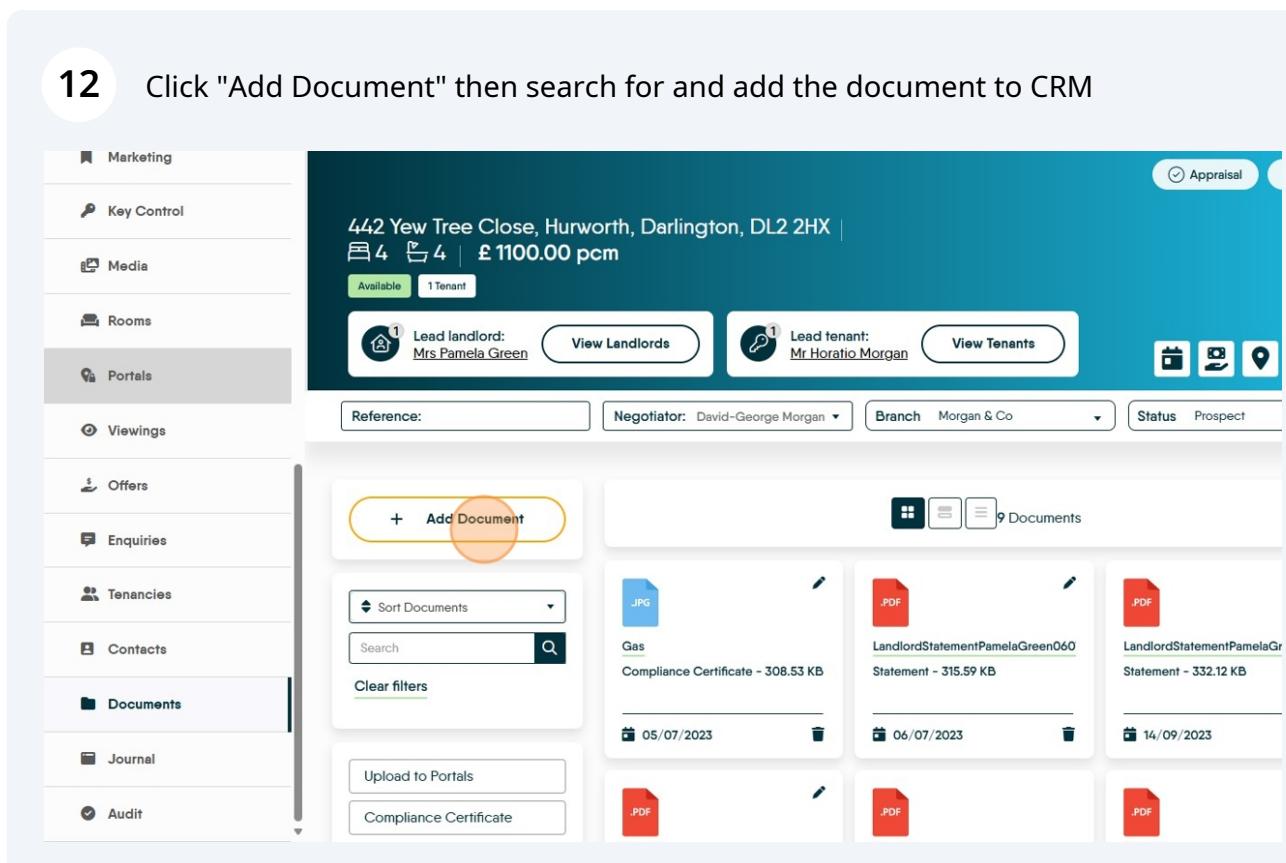
Media Management: A section for managing property media, including an 'Add Media' button, a media viewer showing a photograph of a large house, and a file viewer showing a PDF document (37.28 kb).

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



The screenshot shows the CRM interface for a property listing at 442 Yew Tree Close, Hurworth, Darlington, DL2 2HX. The property is available for £1100.00 pcm. The 'Documents' section is highlighted with an orange circle. The interface includes a sidebar with navigation links like Marketing, Key Control, Media, Rooms, Portals, Viewings, Offers, Enquiries, Tenancies, Contacts, and Audit. The main content area shows an 'Add Media' button, an image of the property, and an EPC rating chart. There are also sections for 'Not Assigned to Room' and 'EPC' with file details (467.27 kb, 37.28 kb, dated 26/06/2025).

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



The screenshot shows the CRM interface for the same property listing. The 'Documents' section is highlighted with an orange circle. The 'Add Document' button is also highlighted with an orange circle. The main content area shows a list of 9 documents, including 'Gas Compliance Certificate', 'Landlord Statement', and 'Landlord Statement'. The sidebar and property details are identical to the previous screenshot.