

UPDATED - 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 listed for £1100.00 pcm, is 'Available', and has '1 Tenant'. It shows lead information for the landlord (Mrs Pamela Green) and tenant (Mr Horatio Morgan). Below this, there are fields for 'Reference', 'Negotiator' (David-George Morgan), 'Branch' (Morgan & Co), and 'Status' (Prospect). The bottom section features a 'PROPERTY PICTURES' gallery with an 'Upload' button, a 'Property Address' field with a search icon, and a 'Property Information' section with a checklist and a currency selector.

2 Click "Compliance"

The screenshot shows a property management dashboard. On the left is a sidebar with various menu items: Live Jobs, EPC Rating, Details, Checklist, Appraisals, Inspections, Accounts, Compliance (highlighted with an orange circle), Information, Maintenance, Payment, Marketing, and Key Control. The main content area displays property details for '442 Yew Tree Close, Hurworth, Darlington, DL2 2HX'. It includes a '4' icon, a '4' icon, and a price of '£ 1100.00 pcm'. Below this, there are buttons for 'View Landlords' and 'View Tenants'. The 'Lead landlord' is 'Mrs Pamela Green' and the 'Lead tenant' is 'Mr Horatio Morgan'. There are also buttons for 'Reference:', 'Negotiator: David-George Morgan', 'Branch: Morgan & Co', and 'Status: Prospect'. The 'PROPERTY PICTURES' section shows an aerial view of the property. The 'Property Address' section shows the 'Postcode: DL2 2HX'. The 'Property Information' section includes 'Fully managed' (checked), 'Rent collect' (checked), and 'Let only' (checked).

3 Click here and add the Current EPC rating.

The screenshot shows the 'Compliance' tab selected in the sidebar. The main content area displays two sections: 'Energy Efficiency' and 'Environmental Impact (CO₂)'. Each section has a 'Current' rating of 'G' (1-20) and a 'Potential' rating of 'G' (1-20). The 'Current' rating is highlighted with an orange circle. Below each rating is a '0' and a dropdown arrow. On the right side, there is a partial view of the 'EPC' rating scale, showing a color-coded bar from 'A' (green) to 'G' (red).

4 Click here and add the Potential EPC rating

Details

Checklist

Appraisals

Inspections

Accounts

Compliance

Information

maintenance

Payment

Marketing

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

Gen on E

Or u

E

100

95

91

85

80

75

70

65

60

55

50

45

40

35

30

25

20

15

10

5

0

Ad

R

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

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

Energy Efficiency Rating	Current	Potential
A		
B		
C		
D		
E		
F		
G		

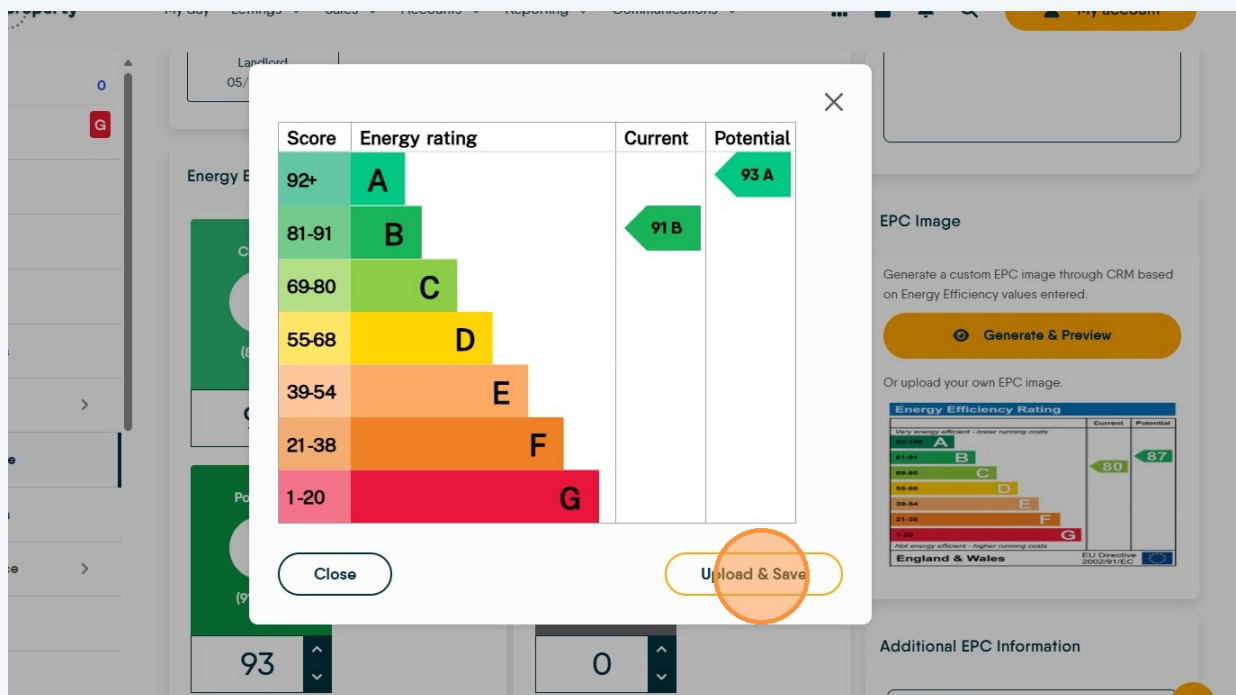
England & Wales

EU Directive 2002/91/EC

Additional EPC Information

6

Click "Upload & Save" this will update and upload the EPC graph image to the media folder for the property.



Tip! Updated Information

To find the EPC details you can now search directly from the CRM Compliance screen, as shown below.

7

If you don't have the accurate EPC information or want to add the certificate details. Click "Find Energy Certificate"

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](#)

[Find Energy Certificate](#)

[Find Energy Certificate \(Scotland\)](#)

Or upload your own EPC image.

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		

Drag and drop files here or click to upload EPC

8

Click "Start now" and follow the process through.

Find an energy certificate

Find an energy certificate for a property in England, Wales or Northern Ireland. This includes homes, business properties and public buildings.

This service is also available [in Welsh \(Cymraeg\)](#).

There's a different service to [find an energy certificate for properties in Scotland](#).

You can use this service to find an existing:

- energy performance certificate (EPC)
- display energy certificate (DEC) for a public building
- air conditioning inspection certificate and report

If your property does not have an energy certificate or it has expired, you can [get a new energy certificate](#).

You can search for a certificate by postcode, street name and town, or certificate number.

[Start now](#)

Related content

[Get a new energy certificate](#)

[Selling a home](#)

[Energy Performance Certificates for your business premises](#)

9 Click "A domestic property" (unless it isn't!)



Find an energy certificate

What type of property is the certificate for?

☒ A domestic property
For example a house or flat.

☐ A non-domestic property
For example a commercial, industrial or public building.

[Continue](#)



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10 Click "Continue"



Find an energy certificate

What type of property is the certificate for?

☒ A domestic property
For example a house or flat.

☐ A non-domestic property
For example a commercial, industrial or public building.

[Continue](#)



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- 11 Click the "Enter the postcode" field type the postcode. Click "Find"

Find an energy certificate

What is the postcode?

Enter the postcode
For example LS1 4AP

dh22hx

Find

If you do not know the postcode

You can [find a postcode on Royal Mail's postcode finder](#).

Or [find an energy certificate using the street name and town](#).

Search by certificate number

You can [find an energy certificate by using its certificate number](#).

- 12 The EPCs for that postcode will show on the screen. You will be able to see easily of the EPC are valid or not.

GOV.UK

Find an energy certificate

14 EPCs for DH22HX

We only list properties with EPCs. **If your address is not listed or your EPC has expired**, you can [get a new energy certificate](#).

Address	Energy rating	Valid until
71, Pelaw Crescent, CHESTER LE STREET, DH2 2HX	D	25 January 2023 Expired
73 Pelaw Crescent, South Pelaw, Co. Durham, DH2 2HX	D	5 January 2032
75 Pelaw Crescent, CHESTER LE STREET, DH2 2HX	C	5 October 2032
76, Pelaw Crescent, CHESTER LE STREET, DH2 2HX	C	13 July 2025 Expired
79, Pelaw Crescent, CHESTER LE STREET, DH2 2HX	C	17 August 2025

13 Select the required EPC

71, Pelaw Crescent, CHESTER LE STREET, DH2 2HX	D	25 January 2023 Expired
73 Pelaw Crescent, South Pelaw, Co. Durham, DH2 2HX	D	5 January 2032
75 Pelaw Crescent, CHESTER LE STREET, DH2 2HX	C	5 October 2032
76, Pelaw Crescent, CHESTER LE STREET, DH2 2HX	C	13 July 2025 Expired
79, Pelaw Crescent, CHESTER LE STREET, DH2 2HX	C	17 August 2025 Expired
81, Pelaw Crescent, CHESTER LE STREET, DH2 2HX	B	10 June 2025 Expired
83 PELAW CRESCENT, SOUTH PELAW, CHESTER-LE-STREET, DH2 2HX	D	5 April 2031
84, Pelaw Crescent, CHESTER LE STREET, DH2 2HX	E	18 October 2019 Expired
86, Pelaw Crescent, CHESTER LE STREET, DH2 2HX	B	13 March 2028
87, Pelaw Crescent, CHESTER LE STREET, DH2 2HX	B	13 March 2028

14 This will show the EPC details

Energy performance certificate (EPC)

Certificate contents

- Rules on letting this property
- Energy rating and score
- Breakdown of property's energy performance
- How this affects your energy bills
- Impact on the environment
- Steps you could take to save energy
- Who to contact about this certificate
- Other certificates for this property

Share this certificate

- Email
- Copy link to clipboard
- Print

86, Pelaw Crescent CHESTER LE STREET DH2 2HX		Energy rating B
Valid until	Certificate number	
13 March 2028	0454-3864-7271-9898-4255	

Property type Semi-detached house

Total floor area 78 square metres

Rules on letting this property

Properties can be let if they have an energy rating from A to E.

You can read [guidance for landlords on the regulations and exemptions](#).

15

If you want to make a copy of this information. Click "Print" and (from Microsoft Print Manager) pick the option to save the print to PDF and save this PDF into the property record

Energy performance certificate (EPC)

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- Who to contact about this certificate
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Share this certificate

- Email
- Copy link to clipboard
- Print

86, Pelaw Crescent
CHESTER LE STREET
DH2 2HX

Energy rating

B

Valid until

13 March 2028

Certificate number

0454-3864-7271-9898-4255

Property type

Semi-detached house

Total floor area

78 square metres

Rules on letting this property

Properties can be let if they have an energy rating from A to E.

You can read [guidance for landlords on the regulations and exemptions](#).

16

Click this text field to add the certificate number.

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 CRM based on Energy Efficiency values entered.

Generate & Preview

Or upload your own EPC image.

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		

Additional EPC Information

RRN Number

Expiry date

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

The screenshot shows a web form for generating an EPC. On the left is a sidebar with a red 'G' icon. The main area contains four cards: 'Current' (B, 81-91) with a score of 91, 'Potential' (A, 91-100) with a score of 93, 'Current' (G, 1-20) with a score of 0, and 'Potential' (G, 1-20) with a score of 0. On the right, the 'EPC Image' section has a 'Generate & Preview' button and a table of energy ratings. Below this, the 'Additional EPC Information' section contains an 'RRN Number' field (12345678+9) and an 'Expiry date' field, which is highlighted with an orange circle. A 'Save' button with a lock icon is at the bottom right.

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

Current: 91 B, Potential: 93 A

RRN Number: 12345678+9

Expiry date:

Save

18 Click here to Save the new EPC.

This screenshot is identical to the previous one, but the 'Save Changes' button at the bottom right is now highlighted with an orange circle. The 'Expiry date' field now contains the text '27/06/2031'.

Save Changes

19

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

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

4 beds | £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

467.27 kb

26/06/2025

EPC

3728 kb

26/06/2025

Current

B (81-91)

91

Potential

A (91-100)

93

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

The screenshot shows the CRM interface with the 'Documents' tab highlighted in the sidebar. The main content area displays property details for 442 Yew Tree Close, Hurworth, Darlington, DL2 2HX. The property is available and has 1 tenant. The lead landlord is Mrs Pamela Green and the lead tenant is Mr Horatio Morgan. The interface includes a sidebar with navigation options: Marketing, Key Control, Media, Rooms, Portals, Viewings, Offers, Enquiries, Tenancies, Contacts, Documents (highlighted), Journal, and Audit. The main content area shows a list of documents, including an image and an EPC rating. The EPC rating is currently 'C' and has a potential of 'A'. The document list includes a 'Gas Compliance Certificate' and a 'Landlord Statement'.

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

The screenshot shows the CRM interface with the 'Add Document' button highlighted in the sidebar. The main content area displays a list of documents, including a 'Gas Compliance Certificate' and a 'Landlord Statement'. The 'Add Document' button is highlighted with an orange circle. The document list includes a 'Gas Compliance Certificate' (308.53 KB) and a 'Landlord Statement' (332.12 KB). The interface also shows a search bar and a 'Clear filters' button. The document list is sorted by 'Sort Documents'.