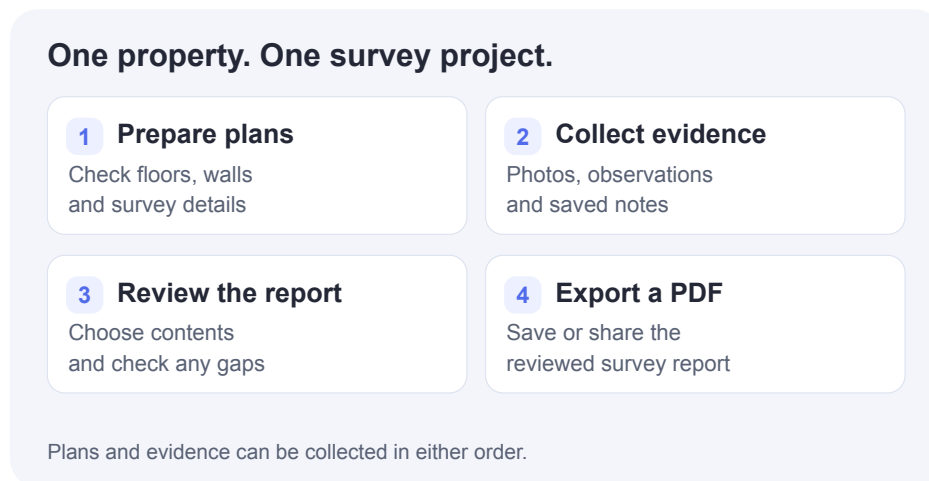


Prepare an EPC survey in Room Scanner

Keep a property's floor plans, observations, photographs and survey report together in one project. You can collect evidence before scanning, work through the plans later, and return to unfinished tasks.

This tutorial covers the **EPC surveys** workflow from project setup to PDF export. The output is survey documentation; Room Scanner does not issue an EPC certificate or replace the assessment process.

[Before you start](#) · [Set up and check plans](#) · [Collect evidence](#) · [Review and export](#)



Workflow illustration, not an app screenshot.

Before you start

Use one project for the property, with separate floor plans for separate storeys. You can reuse an existing project without rescanning it.

Choose the survey method deliberately: **General survey** keeps measured boundary lengths; **UK / RdSAP** adds heat-loss-perimeter calculations. Check the method when creating or enabling the survey, and confirm it before export.

Photos and notes can be added before there are any floor plans. The tasks are not a mandatory sequence.

Getting started also offers a temporary example you can explore without creating a real property.

1. Open or create the survey project

New property: on **Projects**, choose **EPC surveys**, then **Start EPC survey**. Enter the project name, add an address if useful, choose the survey method and tap **Continue**.

Existing property: open the project, choose **Start EPC survey** under **Professional tools**, check the method and tap **Enable EPC survey**. If already enabled, open **EPC surveys** under **Plans & reports**.

Enabling the survey uses the plans already in that project. To change the project's survey preferences later, use **Survey settings** in its EPC workspace.

2. Add and organise the plans

From the project, tap **Add plan**, choose **Floor**, then scan, enter measurements or add existing scans. Save each completed floor before starting the next storey.

In the EPC workspace, open **Check floor plans**, then select a plan. Check room boundaries, joins, openings and dimensions. Use **Floor and plan details** to check its floor assignment. Save any edits before leaving the editor.

For **Clean EPC survey**, prepare one assembled plan per floor, with a floor assigned. Separate captures on the same storey must be combined and aligned first. Relabelling one as another floor does not fix the geometry. The [multi-storey tutorial](#) explains how to organise the captures.

3. Review the relevant survey details

Use the tasks in **Property & plans** to choose the floor plan you want to review:

- **Property settings:** check the plan's property and building information.
- **Classify walls:** review wall classifications and measurements against the property.
- **Set property orientation:** check north and the building's front. The task explains how to select an external wall and use **Set as front**; save your changes.
- **Room in Roof:** record and review the relevant roof-room survey data where applicable.

An empty record does not prove a feature is absent or not applicable. Review the actual property and any outstanding plan checks.

4. Take photos and record observations

1. Open **Photos & evidence**. It starts on **Take photos**.
2. Check **Save new photos to**. Choose the intended room or area before taking photos; use a named area for a place such as the loft or exterior.
3. Tap an evidence category to open the camera. Confirm the saved-photo feedback as you capture.
4. Open **Library** to review saved photos or use **Import photos** to add existing images. Check **Show evidence from** if something appears missing.
5. Back in the EPC workspace, open **Evidence notes**, choose a heading and save the observation. Review **Evidence checklist** for the evidence you still need.

If the app reports that a photo was not saved, retake it before moving on. Photo capture and note editing have different save flows: photos show capture feedback, while note changes must be saved.

Give each photo a clear destination

Before capture

Choose room or area
Check the destination
Select a category

After capture

Check saved feedback
Review it in Library
Save notes separately

A photo of the loft should be filed where you expect to find it.

Check the destination before capture and the saved result afterwards.

5. Choose the report contents

Open **Preview survey report**, then expand **Report options**. Check the file name, method, **Plans to include** and evidence options.

Choose **Complete survey report** for the selected plans and survey documentation. **Clean EPC survey** requires one assembled plan per floor. If floor checks block that output, correct the plans or use **Use complete survey report** to keep separate plan sections; this does not assemble them into one clean floor drawing.

Review photo inclusion, captions and any date or location information you intend to share. Some formats and EPC sheets require Pro; use the access options shown in your app.

6. Review and export

1. Let the preview finish, then open it and inspect every page.
2. Review plan checks and completeness notices. Missing photos can appear as placeholders; a preview alone is not proof that all evidence is present.
3. If you change plans or notes, save them and check a freshly generated preview.
4. Tap **Export survey report** and choose a destination in the share sheet. Open the saved PDF to confirm that the intended plans and evidence are included.

You can export a draft before finalising. **Finalise survey** records the checked figures and marks the survey final; it does not send the PDF or issue a certificate. Use it after you have reviewed the survey figures. Later changes can trigger a changed-since-finalised notice. Review them and use **Finalise again**, or **Reopen survey** to return it to open status.

Leave and continue later

Save open note and plan edits, close the report and use the back arrow to return to the project. Reopen it from **Projects**, then choose **EPC surveys** under **Plans & reports**. You can also find an existing property from the EPC surveys entry on Projects.

There is no need to finish a getting-started checklist to leave. Your saved project is the place to continue the work.

Common questions

Can I take photos before I scan

Yes. Start the project and use **Photos & evidence**. Check the saving destination and file the evidence in the appropriate room or named area as the survey develops.

Why can I not export a Clean EPC survey

Check for a missing floor, multiple selected plans on one floor, or a capture spanning more than one storey. Assign the correct floors and combine suitable same-floor captures. A floor label cannot split a multi-storey capture.

Does a green check mean the survey is certified

No. App checks and finalisation describe recorded data and review status. They do not certify the property or replace your assessment.

Need a branded sales presentation too? Follow the [Estate Agent tutorial](#) using the same project. For help with a specific step, [contact us](#) with your app version and device.