

# [ABS012: Adding Addresses and Trustmark Measures to a Batch](#)

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Adding Addresses and Trustmark Measures to a Batch. This mini guide will take portal users through the steps of validating addresses, adding them to batches, retrieving Trustmark measures associated with those addresses, and inputting measure costs.

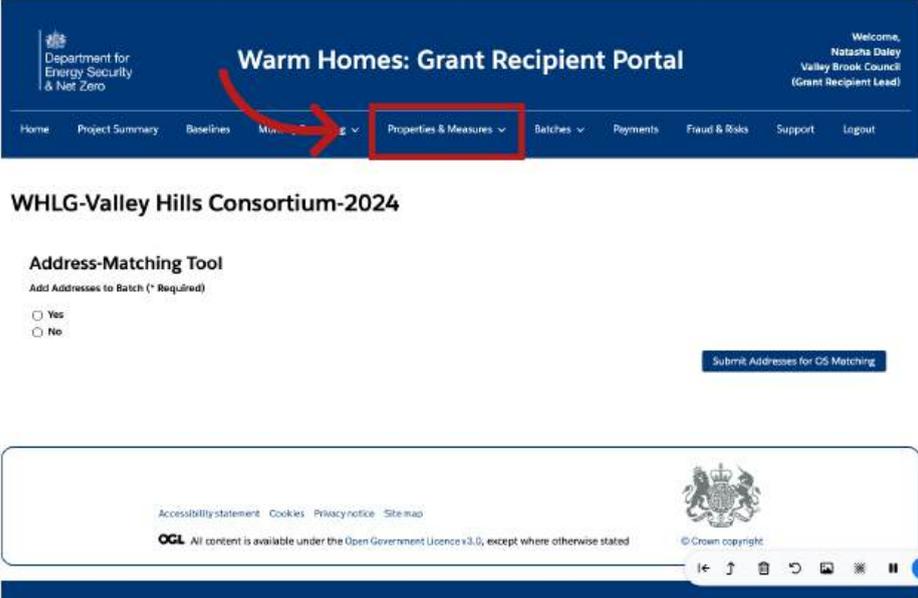
**1. All the screenshots in this user guide are taken from the DESNZ training environment. Since the system is still in development, there may be some differences to the screens you see in the live environment, and the data used is purely for demonstration purposes.**

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## 2. Click "Properties & Measures"

In the portal, the Properties & Measures section serves as the hub for all the functionalities discussed.



The screenshot displays the 'Warm Homes: Grant Recipient Portal' interface. At the top left, the logo for the Department for Energy Security & Net Zero is visible. The main header area contains the title 'Warm Homes: Grant Recipient Portal' and a welcome message for 'Natasha Daley, Valley Brook Council (Grant Recipient Lead)'. A navigation menu is located below the header, with the 'Properties & Measures' option highlighted by a red box and a red arrow pointing to it. Other menu items include Home, Project Summary, Baselines, Measures, Batches, Payments, Fraud & Risks, Support, and Logout. Below the navigation menu, the page title is 'WHLG-Valley Hills Consortium-2024'. The main content area features an 'Address-Matching Tool' section with a sub-heading 'Add Addresses to Batch (\* Required)' and two radio button options: 'Yes' and 'No'. A 'Submit Addresses for OS Matching' button is positioned to the right of these options. At the bottom of the page, there is a footer containing links for 'Accessibility statement', 'Cookies', 'Privacy notice', and 'Site map', along with the Open Government Licence (OGL) text and the Crown copyright logo. A browser navigation bar is visible at the very bottom of the screenshot.

## 3. Check Addresses

Check addresses. You first have to validate addresses prior to checking Trustmark



Department for  
Energy Security  
& Net Zero

## Check Addresses

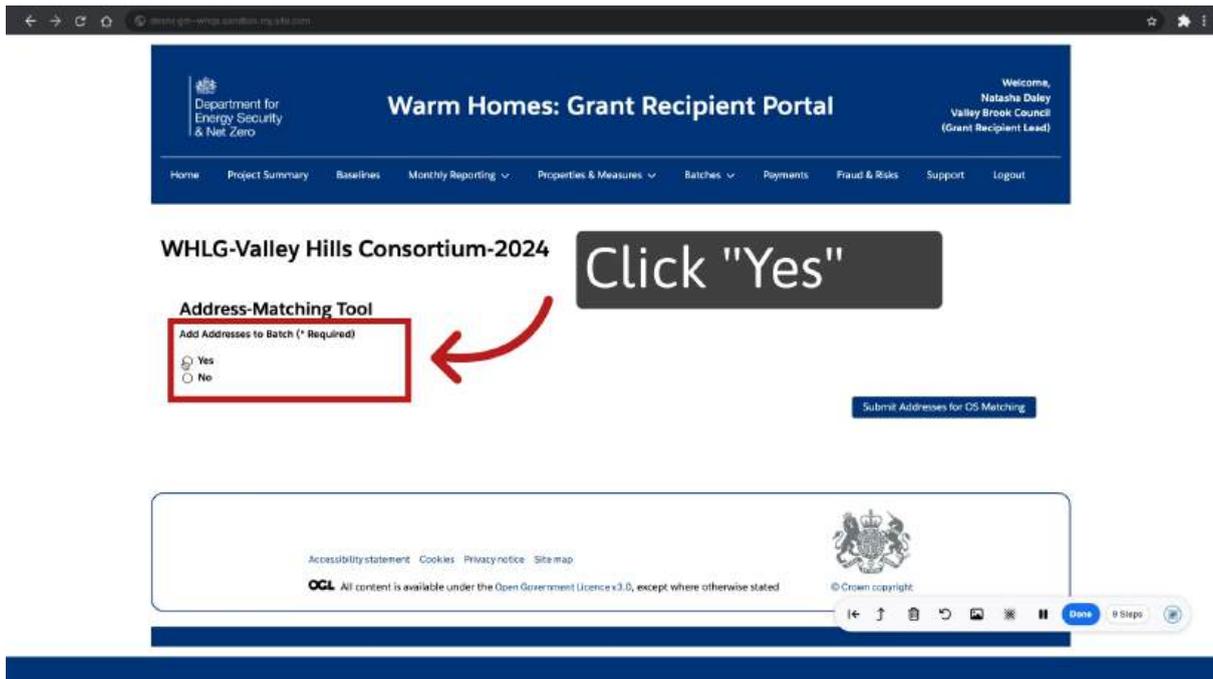
### 4. Click "Address Lookup"

Access the Address Lookup section.

The screenshot shows the 'Warm Homes: Grant Recipient Portal' interface. The header includes the Department for Energy Security & Net Zero logo, the title 'Warm Homes: Grant Recipient Portal', and a user greeting: 'Welcome, Natasha Daisy, Valley Brook Council (Grant Recipient Lead)'. The navigation menu includes 'Home', 'Project Summary', 'Baselines', 'Monthly Reporting', 'Properties & Measures', 'Batches', 'Payments', 'Fraud & Risks', 'Support', and 'Logout'. The 'Properties & Measures' dropdown menu is open, showing 'Address Lookup' (highlighted with a red box), 'Refresh Measures with Data', and 'Update Measure Costs'. A red arrow points from the 'Address Lookup' option in the dropdown to the 'Address Lookup' button in the main content area. Below the dropdown, the main content area shows 'WHLG-Valley Hills Consortium-202' and 'Properties with Measures Installed'. A table lists one property: '15 ST MARYS ROW, ALDBURY BECCLES, NR34 0AL' with a total cost of '£0.00'. A 'Check Details for chosen Property Record' button is located below the table. The footer includes 'Accessibility statement', 'Cookies', 'Privacy notice', 'Site map', and the OGL logo.

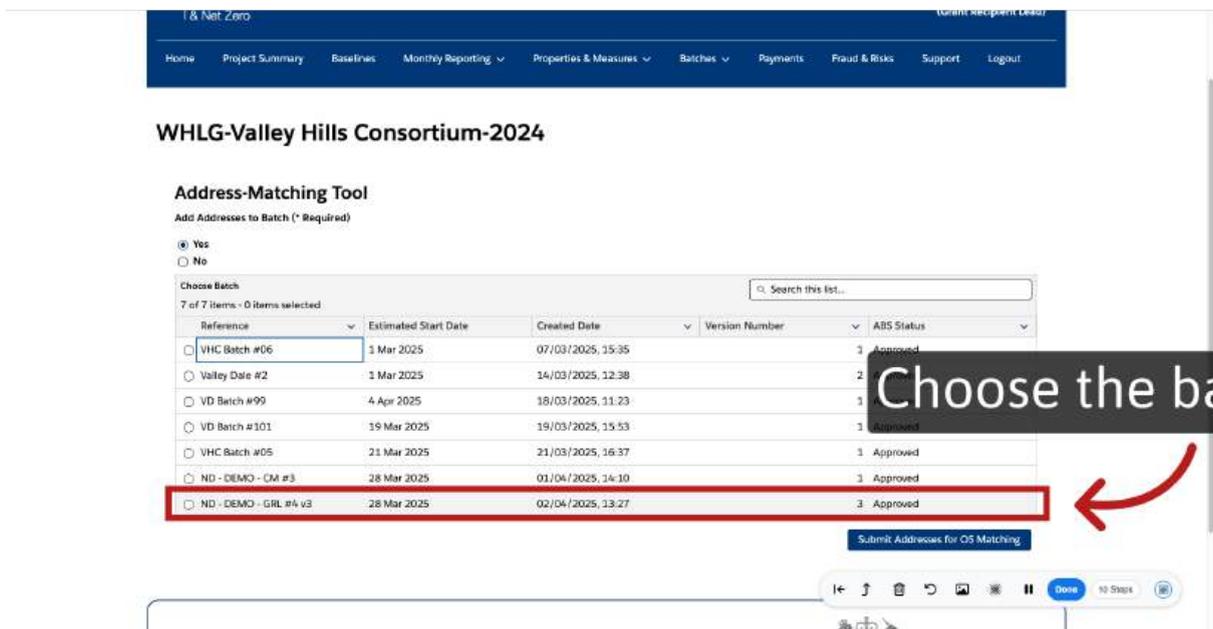
### 5. Fill "Yes"

You have the flexibility to decide whether to include addresses in a batch. It's likely that you'll want to select 'Yes.'



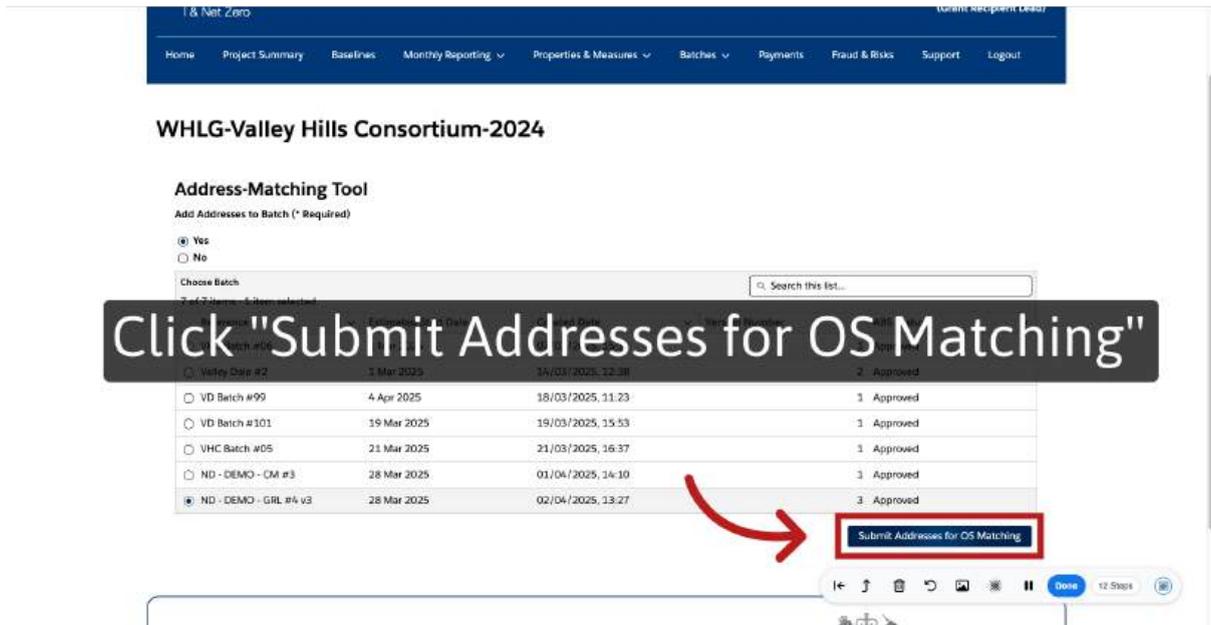
## 6. Choose the batch

Then choose the batch



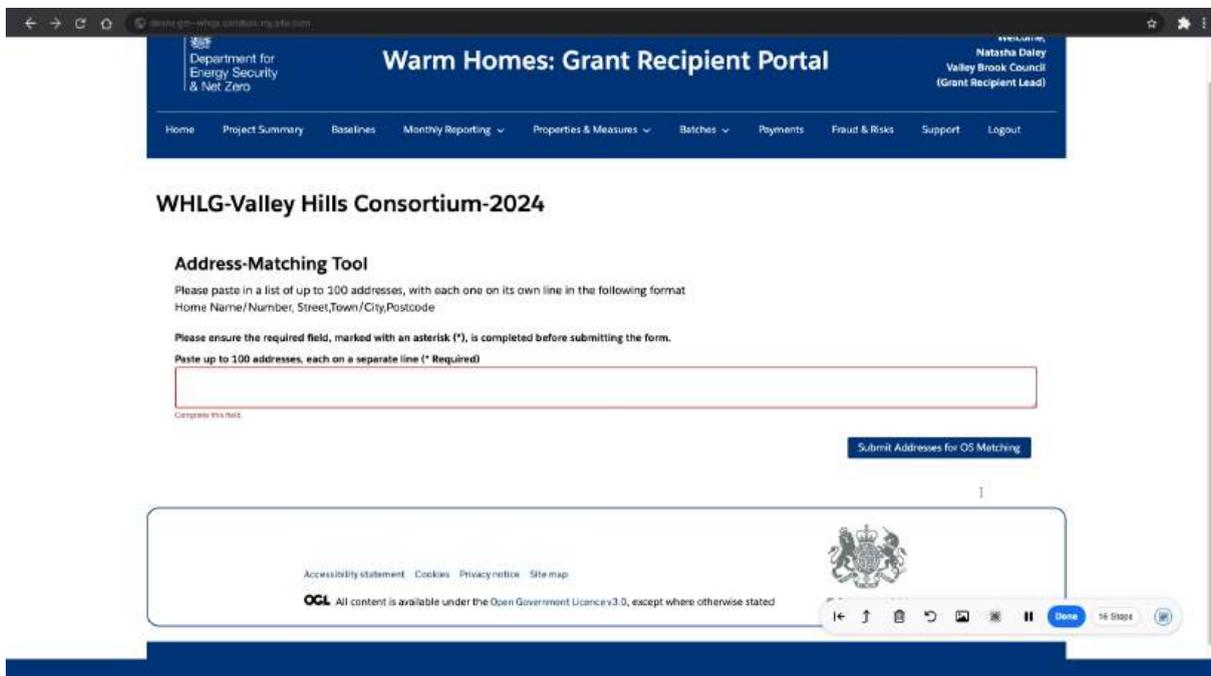
## 7. Click "Submit Addresses for OS Matching"

Submit addresses for OS matching.



## 8. Enter Addresses

Ensure that each component of the address is separated by a comma, and each address sits on its own line. // This is where the system will validate the addresses you have with address data from the Ordinance Survey. Click on "Proceed to OS Matching" and then wait a moment for the system to do its thing.



## 9. Click "Refresh"

Please note that you can only submit up to 100 addresses at once, so you are advised to perform this process regularly, so that they can be processed in small chunks.// Refresh the page.

The screenshot shows the 'Warm Homes: Grant Recipient Portal' for 'WHLG-Valley Hills Consortium-2024'. The header includes the Department for Energy Security & Net Zero logo and the user's name, Natasha Daley, Valley Brook Council (Grant Recipient Lead). A navigation menu contains links for Home, Project Summary, Baselines, Monthly Reporting, Properties & Measures, Batches, Payments, Fraud & Risk, Support, and Logout. The main content area displays 'Still Searching...' and 'Please Press Button Below'. A message states: 'OS matching takes a little time. Please wait a few moments and then press refresh. If the count has not yet reached the total please press refresh again and repeat every few moments until the results table appears.' A red arrow points to a 'Refresh' button. A large black box with white text says 'Click "Refresh"'. The footer includes accessibility links, OGL copyright notice, and a progress indicator showing '20 Steps'.

## 10. OS Matched Addresses page

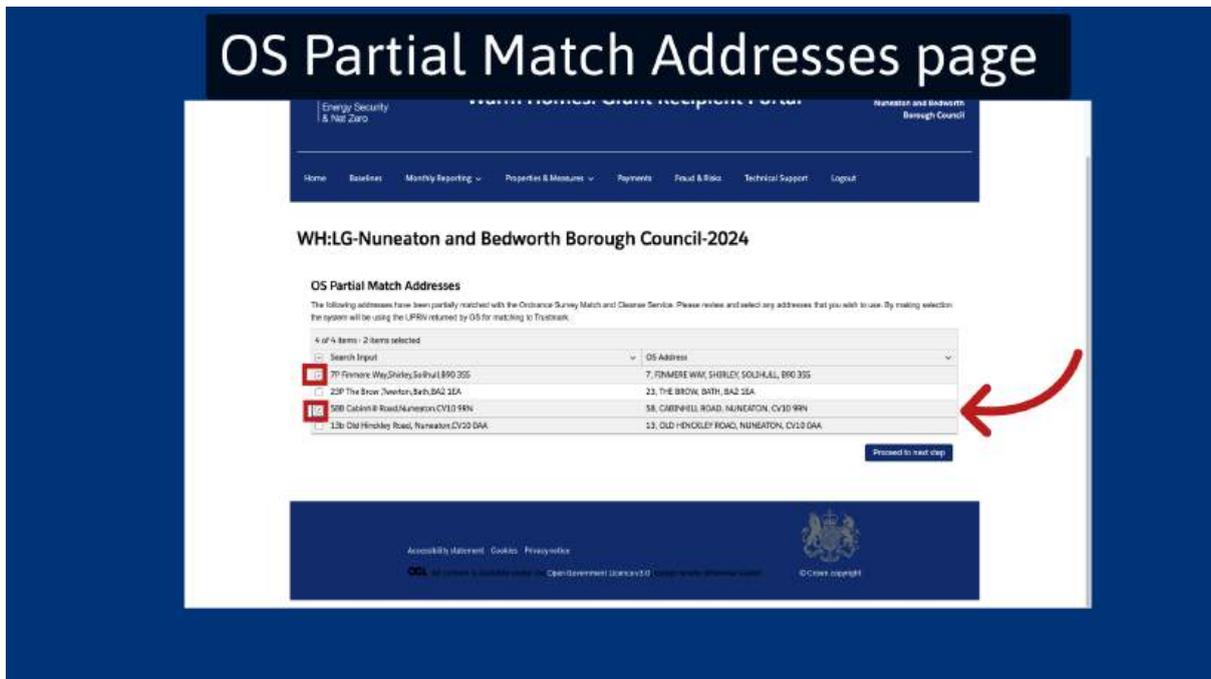
The system will first show you the page headed "OS Matched Addresses", which is a list of your addresses that had either a "good" or "exact" match with those in the Ordnance Survey.// Proceed to the next step.

The screenshot shows the 'OS Matched Addresses' page for 'WHLG-Valley Hills Consortium-2024'. A red box highlights the table of matched addresses, with a red arrow pointing to it. The table has columns for 'Address Input', 'OS Full Address', and 'OS Match Result'. A 'Proceed to next step' button is located below the table. The footer includes accessibility links, OGL copyright notice, and a progress indicator showing '21 Steps'.

Address Input	OS Full Address	OS Match Result
<input checked="" type="checkbox"/> 1 The Walk, Wainfleet, Skegness PE24 4EG	1, THE WALK, WAINFLEET, SKEGNESS, PE24 4EG	GOOD
<input checked="" type="checkbox"/> Kingsmede, Cumberworth Lane, Mumby, Ailford LN13 9LP	KINGSMEDG, CUMBERWORTH LANE, MUMBY, ALFORD, LN13 9LP	GOOD
<input checked="" type="checkbox"/> 9 Main Road, West Keal, Spilsby PE23 4BE	9, MAIN ROAD, WEST KEAL, SPILSBY, PE23 4BE	GOOD
<input checked="" type="checkbox"/> Brambles Patch, North Road, Tattershall Thorpe Lincoln LN4 4PQ	BRAMBLES PATCH, NORTH ROAD, TATTERSHALL THORPE, LINCOLN, LN4 4PQ	GOOD
<input checked="" type="checkbox"/> Ebor House, Northlands, Sibsey Boston PE22 0JA	EBOR HOUSE, NORTHLANDS, SIBSEY, BOSTON, PE22 0JA	GOOD

## 11. OS Partial Match Addresses page

In cases where addresses are only partially matched, a dedicated page titled 'OS Partial Match Addresses' will be presented. On this page, you can review the available options and select the addresses you wish to proceed with. Please note that if an address does not match exactly, Trustmark may be unable to validate it or retrieve any associated information.measures.

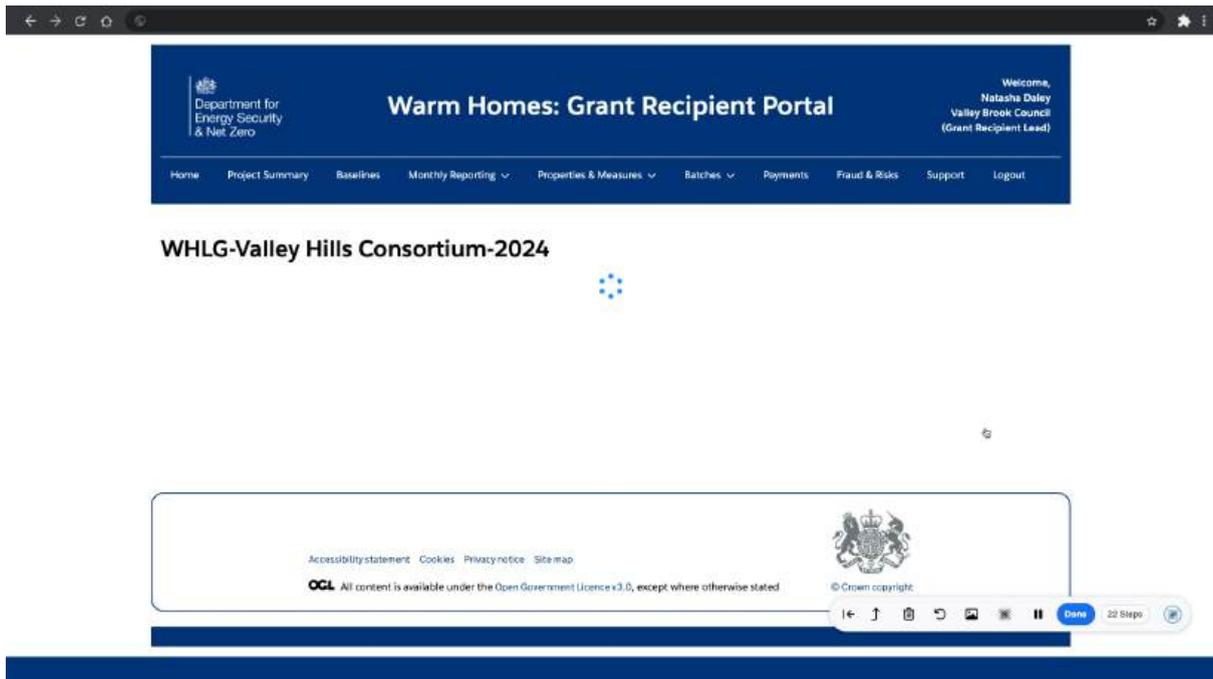


The screenshot displays the 'OS Partial Match Addresses' page for Nuneaton and Bedworth Borough Council. The page title is 'OS Partial Match Addresses' and the sub-header is 'WH:LG-Nuneaton and Bedworth Borough Council-2024'. Below the header, there is a navigation menu with links for Home, Baselines, Monthly Reporting, Properties & Measures, Payments, Fraud & Risk, Technical Support, and Logout. The main content area shows a table of 4 items with 2 items selected. A red arrow points to the 'Proceed to next step' button.

Search Input	OS Address
<input checked="" type="checkbox"/> 77 Finmere Way, Shirley, Solihull, B90 3GS	7, FINMERE WAY, SHIRLEY, SOLIHULL, B90 3GS
<input checked="" type="checkbox"/> 23P The Brow, Nuneaton, Bedw, BA2 1SA	23, THE BROW, BATH, BA2 1SA
<input type="checkbox"/> 58B Cabden @ Road, Nuneaton, CV10 9RN	58, CABIN HILL ROAD, NUNEATON, CV10 9RN
<input type="checkbox"/> 13b Old Hincley Road, Nuneaton, CV10 9AA	13, OLD HINCLEY ROAD, NUNEATON, CV10 9AA

## 12. OS Unmatched Addresses

Lastly, OS Unmatched Addresses displays those where there was no match. Please note that the system does not permit you to retrieve measures for these unmatched addresses. To modify an address, simply re-enter a valid address in the 'Address Lookup' field.



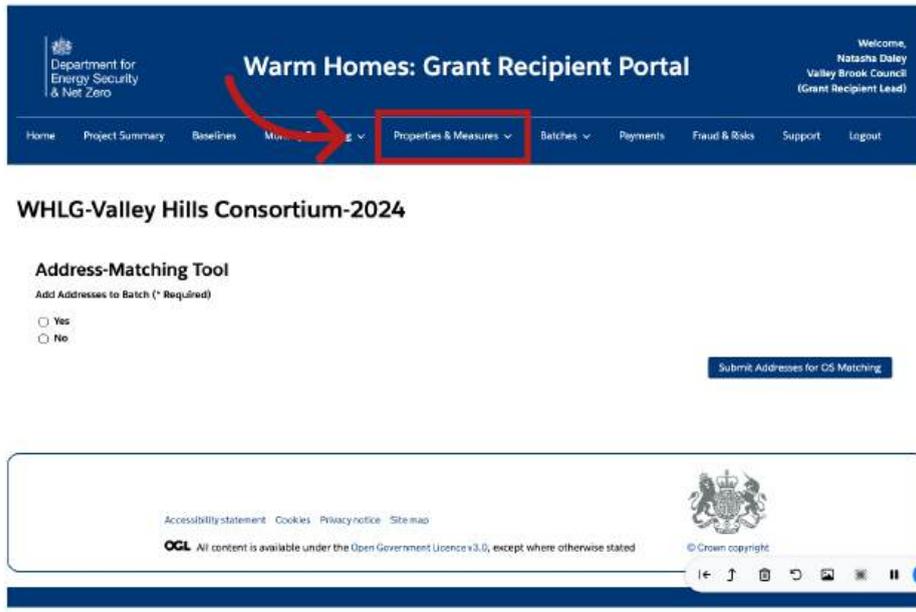
### 13. Retrieving Trustmark Data

Retrieving Trustmark Data: Now that we've completed that part of the process, let's proceed to the next step: retrieving the Trustmark data.



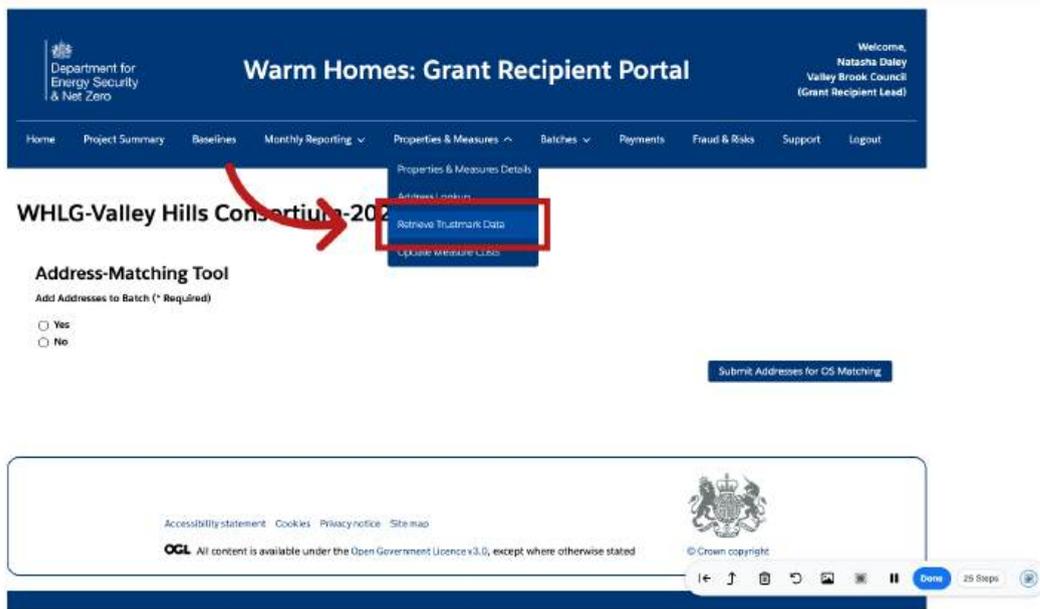
### 14. Click "Properties & Measures"

Access the Properties & Measures section, once again.



## 15. Click "Retrieve Trustmark Data"

Click on "Retrieve Trustmark data"



## 16. Click "Check Addresses with Trustmark"

On screen, you will see the matched addresses appended with their unique OS UPRN codes. // Click on "Check Addresses with Trustmark"

Department for Energy Security & Net Zero

Warm Homes: Grant Recipient Portal

Welcome, Natasha Daley  
Valley Brook Council  
(Grant Recipient Lead)

Home Project Summary Baselines Monthly Reporting Properties & Measures Batches Payments Fraud & Risks Support Logout

### WHLG-Valley Hills Consortium-2024

Address Records that require Trustmark Data

6 of 6 items

OS Full Address	OS UPRN
24, ANCASTER AVENUE, CHAPEL ST. LEONARDS, SKEGNESS, PE24 5SL	100030782012
1, THE WALK, WAINFLEET, SKEGNESS, PE24 4EG	100030793992
KINGSMEDE, CUMBERWORTH LANE, MUMBY, ALFORD, LN13 9LP	10002120390
9, MAIN ROAD, WEST KEAL, SPILSBY, PE23 4BE	100032168590
BRAMBLES PATCH, NORTH ROAD, TATTERSHALL THORPE, LINCOLN, LN4 4PQ	100030763839
EBOR HOUSE, NORTHLANDS, SIBSEY, BOSTON, PE22 0UA	200001143092

[Check Addresses with Trustmark](#)

Accessibility statement Cookies Privacy notice Site map

26 Steps

## 17. Review the Trustmark data

Trustmark will return the addresses with their associated measure types, date of completion and Trustmark UMR code.//

Department for Energy Security & Net Zero

Warm Homes: Grant Recipient Portal

Welcome, Natasha Daley  
Valley Brook Council  
(Grant Recipient Lead)

Home Project Summary Baselines Monthly Reporting Properties & Measures Batches Payments Fraud & Risks Support Logout

### WHLG-Valley Hills Consortium-2024

Review the Trustmark data

Short address	Measure Type	Date of Completing Installation	Trustmark UMR
1 The Walk, PE24 4EG	Loft insulation where there is less than or equal to 100mm pre-existing insulation	8 Nov 2024	P278136HL74
1 The Walk, PE24 4EG	Solar PV	30 Oct 2024	P2781365VHP
1 The Walk, PE24 4EG	Upgrade - high heat retention	17 Oct 2024	P278136V97K
Kingsmeade, LN13 9LP	Loft insulation where there is greater than 100mm pre-existing insulation	10 Oct 2024	P284985KB9N
Kingsmeade, LN13 9LP	Solar PV	5 Sept 2024	P284985LZHY
9 Main Road, PE23 4BE	Solar PV	2 Aug 2024	P2173094GKN
9 Main Road, PE23 4BE	Loft insulation where there is less than or equal to 100mm pre-existing insulation	30 Jul 2024	P217309ANZE
Brambles Patch, LN4 4PQ	Solar PV	14 Oct 2024	P2646597GM5B
Ebor House, PE22 0UA	Solar PV	16 Jul 2024	P201770R89M

[Finish Adding Trustmark Data](#)

27 Steps

## 18. Click "Finish Adding Trustmark Data"

Finalise the process by clicking on "Finish Adding Trustmark Data"

## Click "Finish Adding Trustmark Data"

The screenshot shows the 'Warm Homes: Grant Recipient Portal' for 'WHLG-Valley Hills Consortium-2024'. The page features a navigation menu with options like 'Home', 'Project Summary', 'Baselines', 'Monthly Reporting', 'Properties & Measures', 'Batches', 'Payments', 'Fraud & Risk', 'Support', and 'Logout'. Below the navigation, there is a table with the following columns: 'Short address', 'Measure Type', 'Date of Completion', 'Installation', and 'Trustmark UMR'. The table currently displays '0 of 0 items' and 'No items to display'. A red arrow points from the table area to a button labeled 'Finish Adding Trustmark Data', which is highlighted with a red rectangular box. At the bottom of the page, there is a footer with 'Accessibility statement', 'Cookies', 'Privacy notice', 'Sitemap', and '© Crown copyright'.

## 19. Update Measure Costs

Update Measure Costs. Alright, we've wrapped up that part, so let's move on to the next thing: updating the measure costs!

The slide features the logo of the Department for Energy Security & Net Zero on the left side. The text 'Update Measure Costs' is centered on the slide in a large, white font.

## 20. Click "Properties & Measures"

Return to the Properties & Measures section.



## WHLG-Valley Hills Consortium-2024

Address Records that require Trustmark Data



## 21. Click "Update Measure Costs"

Navigate to the Update Measure Costs section



## WHLG-Valley Hills Consortium-2024

Address Records that require Trustmark Data



## 22. Properties without measure costs

Here is a list of all the matched addresses that have yet to receive measure costs on this funding award. 5 have been chosen here.

Department for Energy Security & Net Zero

Warm Homes: Grant Recipient Portal

Welcome, Malasha Daley  
Valley Brook Council  
(Grant Recipient Lead)

Home Project Summary Baselines Monthly Reporting Properties & Measures Batches Payments Fraud & Risks Support Logout

### WHLG-Valley Hills Consortium-2024

#### Measures Cost Input

The measures listed below, including any Additional Capital Expenditure, are awaiting the allocation of a cost. If there are no costs to add, enter '0' (zero) to remove the item from the list entirely. Please note, you can choose 30 or fewer items at a time to update.

Measures that still require costs to be input

17 of 17 items - 0 items selected

Property Address	TM Measure Type	Date of Completing Inst...	Trustmark UMR	UPRN	Batch Id
<input checked="" type="checkbox"/> KINGSMEDE, MUMBY, ALFORD., LN13 9LP	Loft Insulation where there is greater than 100mm pre-existing insulation	10 Oct 2024	P284985K89N	10002120390	
<input type="checkbox"/> KINGSMEDE, MUMBY, ALFORD., LN13 9LP	Solar PV	5 Sept 2024	P284985LZHY	10002120390	
<input type="checkbox"/> KINGSMEDE, MUMBY, ALFORD., LN13 9LP	Additional Capital Expenditure	2 Apr 2025		10002120390	
<input type="checkbox"/> BRAMBLES PATCH, TATTERSHALL THORPE, LINCOLN., LN4 4PQ	Solar PV	14 Oct 2024	P244697GM5B	100030763839	
<input type="checkbox"/> BRAMBLES PATCH, TATTERSHALL THORPE,	Additional Capital	2 Apr 2025		100030763839	

Done 30 Steps

## 23. Add costs per measure

Department for Energy Security & Net Zero

Warm Homes: Grant Recipient Portal

Welcome, Malasha Daley  
Valley Brook Council  
(Grant Recipient Lead)

Home Project Summary Baselines Monthly Reporting Properties & Measures Batches Payments Fraud & Risks Support Logout

### WHLG-Valley Hills Consortium-2024

#### Measures Cost Input

The measures listed below, including any Additional Capital Expenditure, are awaiting the allocation of a cost. If there are no costs to add, enter '0' (zero) to remove the item from the list entirely. Please note, you can choose 30 or fewer items at a time to update.

Measures that still require costs to be input

17 of 17 items - 0 items selected

Property Address	TM Measure Type	Date of Completing Inst...	Trustmark UMR	UPRN	Batch Id
<input checked="" type="checkbox"/> KINGSMEDE, MUMBY, ALFORD., LN13 9LP	Loft Insulation where there is greater than 100mm pre-existing insulation	10 Oct 2024	P284985K89N	10002120390	
<input type="checkbox"/> KINGSMEDE, MUMBY, ALFORD., LN13 9LP	Solar PV	5 Sept 2024	P284985LZHY	10002120390	
<input type="checkbox"/> KINGSMEDE, MUMBY, ALFORD., LN13 9LP	Additional Capital Expenditure	2 Apr 2025		10002120390	
<input type="checkbox"/> BRAMBLES PATCH, TATTERSHALL THORPE, LINCOLN., LN4 4PQ	Solar PV	14 Oct 2024	P244697GM5B	100030763839	
<input type="checkbox"/> BRAMBLES PATCH, TATTERSHALL THORPE,	Additional Capital Expenditure	2 Apr 2025		100030763839	

Done 48 Steps

## 24. Enter costs

You will find an input field for entering costs associated with each measure for every address. The system will automatically calculate the totals for you.

**Measure Cost Input**

If there are no costs to add, enter '0' (zero) to remove the item from the list entirely. If you don't have any costs to enter yet, simply leave the value blank.

**KINGSMED, MUMBY, ALFORD, , LN13 9LP**  
 Measure Type: Loft insulation where there is greater than 100mm pre-existing insulation  
 Completion Date: 10 October 2024  
 UMR: P284985K89N  
 Batch Id: Not Applicable  
 Total Cost of Single Measure

**KINGSMED, MUMBY, ALFORD, , LN13 9LP**  
 Measure Type: Solar PV  
 Completion Date: 5 September 2024  
 UMR: P284985L2HY  
 Batch Id: Not Applicable  
 Total Cost of Single Measure

**KINGSMED, MUMBY, ALFORD, , LN13 9LP**  
 Measure Type: Additional Capital Expenditure  
 Completion Date: 2 April 2025  
 UMR: WHLG/VHC-ABS-00000050  
 Batch Id: WHLG/VHC-ABS-00000050  
 Total Cost of Single Measure  
  
 Measure Description

BRAMBLES PATCH, TATTERSHALL THORPE, LINCOLN, , LN4 4PQ

Done 51 Steps

## 25. Overview

**Measure Cost Input**

If there are no costs to add, enter '0' (zero) to remove the item from the list entirely. If you don't have any costs to enter yet, simply leave the value blank.

**KINGSMED, MUMBY, ALFORD, , LN13 9LP**  
 Measure Type: Loft insulation where there is greater than 100mm pre-existing insulation  
 Completion Date: 10 October 2024  
 UMR: P284985K89N  
 Batch Id: Not Applicable  
 Total Cost of Single Measure

**KINGSMED, MUMBY, ALFORD, , LN13 9LP**  
 Measure Type: Solar PV  
 Completion Date: 5 September 2024  
 UMR: P284985L2HY  
 Batch Id: Not Applicable  
 Total Cost of Single Measure

**KINGSMED, MUMBY, ALFORD, , LN13 9LP**  
 Measure Type: Additional Capital Expenditure  
 Completion Date: 2 April 2025  
 UMR: WHLG/VHC-ABS-00000050  
 Batch Id: WHLG/VHC-ABS-00000050  
 Total Cost of Single Measure  
  
 Measure Description

BRAMBLES PATCH, TATTERSHALL THORPE, LINCOLN, , LN4 4PQ

Done 52 Steps

## 26. Check Properties and Costs

In the section titled "Properties & Measures Details," you can access the total amounts for each address. The records in this section will be continuously updated as you input costs related to the measures.

The screenshot shows the 'Warm Homes: Grant Recipient Portal' interface. The header includes the Department for Energy Security & Net Zero logo and the user's name, Natasha Daley, Valley Brook Council (Grant Recipient Lead). The navigation menu includes Home, Project Summary, Baselines, Monthly Reporting, Properties & Measures (selected), Batches, Payments, Fraud & Risks, Support, and Logout. A dropdown menu for 'Properties & Measures' is open, showing options: Properties & Measures Details, Address Lookup, Retrieve Trustmark Data, and Update Measure Costs.

The main content area is titled 'WHLG-Valley Hills Consortium-202' and 'Measures Cost Input'. Below the title is a note: 'The measures listed below, including any Additional Capital Expenditure, are awaiting the allocation of a cost. If there are no costs to add, enter '0' (zero) to remove the item from the list entirely. Please note, you can choose 30 or fewer items at a time to update.'

The table 'Measures that still require costs to be input' has 12 items, with 0 selected. The table columns are: Property Address, TM Measure Type, Date of Completing Inst..., Trustmark UMR, UPRN, and Batch Id.

Property Address	TM Measure Type	Date of Completing Inst...	Trustmark UMR	UPRN	Batch Id
1 THE WALK, WAINFLEET, SKEGNESS, PE24 4EG	Solar PV	30 Oct 2024	P2781365VHP	100030793992	
1 THE WALK, WAINFLEET, SKEGNESS, PE24 4EG	Loft insulation where there is less than or equal to 100mm pre-existing insulation	8 Nov 2024	P278136HL76	100030793992	
1 THE WALK, WAINFLEET, SKEGNESS, PE24 4EG	Upgrade - high heat retention	17 Oct 2024	P278136V97K	100030793992	
1 THE WALK, WAINFLEET, SKEGNESS, PE24 4EG	Additional Capital Expenditure	2 Apr 2025		100030793992	
9 MAIN ROAD, WEST KEAL, SPILSBY, PE23 4BE	Solar PV	2 Aug 2024	P2173D94GKN	100032168590	

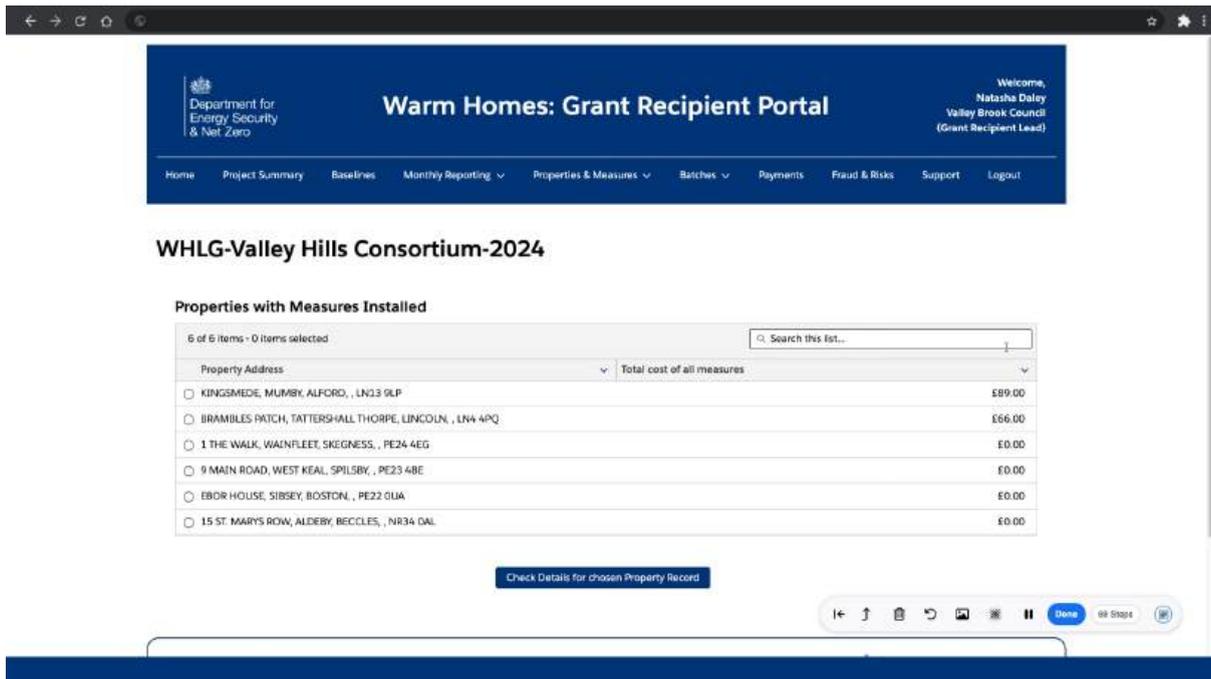
## 27. View Properties Against a Batch

View Properties Against a Batch. Now, let's take a closer look at the verified batch property details.

The banner features the Department for Energy Security & Net Zero logo on the left. The text 'View Properties Against a Batch' is centered in a large, white, sans-serif font.

## 28. Overview

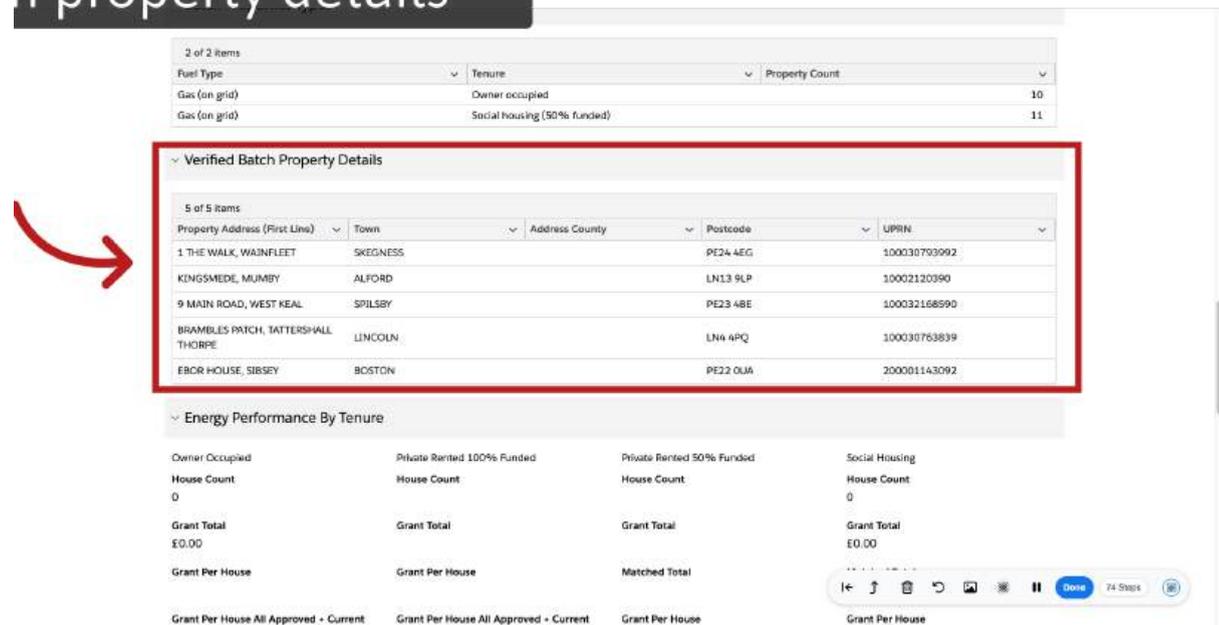
You can do this by navigating to the batch in question and viewing summary details.



## 29. Review the verified batch property details

View the last item in the list.

### Property details



This mini guide provided a thorough walkthrough for portal users on validating addresses. It covered the process of adding addresses to batches, retrieving the Trustmark measures data linked to those addresses, and entering the associated measure costs.

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