

Adding Compliance Checks in CRM System

iam property

This guide is essential for anyone looking to ensure compliance in their CRM system is managed effectively. By following the straightforward steps outlined, users can easily add various compliance checks, including crucial inspections like Fixed Wiring and assessments.

Streamlining compliance processes not only enhances operational efficiency but also helps maintain legal standards, safeguarding both agents and landlords.

1 Navigate to the property you are adding the Compliance checks to.

iam property

My dayLettingsSalesAccountsReportingCommunications

My account

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

Lead landlord: Mrs Pamela GreenView LandlordsLead tenant: Mr Horatio MorganView Tenants

Reference:Negotiator: David-George MorganBranch: Morgan & CoStatus: Prospect

Property Marketing

Currency: GBP

Rent (GBP) £ 1,100.00	Deposit (GBP) 0.00	Bedrooms 4	Bathrooms 4	Receptions 2
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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 | GBP 1100.00 pcm

Available 1 Tenant

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Lead tenant: Mr Horatio Morgan View Tenants

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

Property Marketing

Currency

Rent (GBP)	Deposit (GBP)	Bedrooms	Bathrooms	Reception
1,100.00	0.00	4	4	2

Property Advertising

3 Click "Add New"

Appraisal Warning

442 Yew Tree Close, Hurworth, Darlington, DL2 2HX | 4 4 | GBP 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

Safety Checks

+ Add New + Add a new type

Gas Safety

Landlord 05/07/2024

Compliance Notes

Enter notes here...

Energy Efficiency Environmental Impact (CO₂)

4

From the options on screen select the type of check you are adding e.g. Click the "Fixed Wiring (EICR)" field.

Add New Safety Check ×

Add a new reminder for a required safety check

Responsibility: Agent ▼ Due Date: 26/06/2025 ▼

Thatchewd Roof	Gas Safety	Fixed Wiring (EICR)	Appliances
Oil Service	Smoke Alarms	Extinguishers	Fire Retardance

Cancel Save

5

Click "Responsibility" from the menu and select who is responsible for the Safety checks completion. Options are Agent, Landlord, Contractor.

Add New Safety Check ×

Add a new reminder for a required safety check

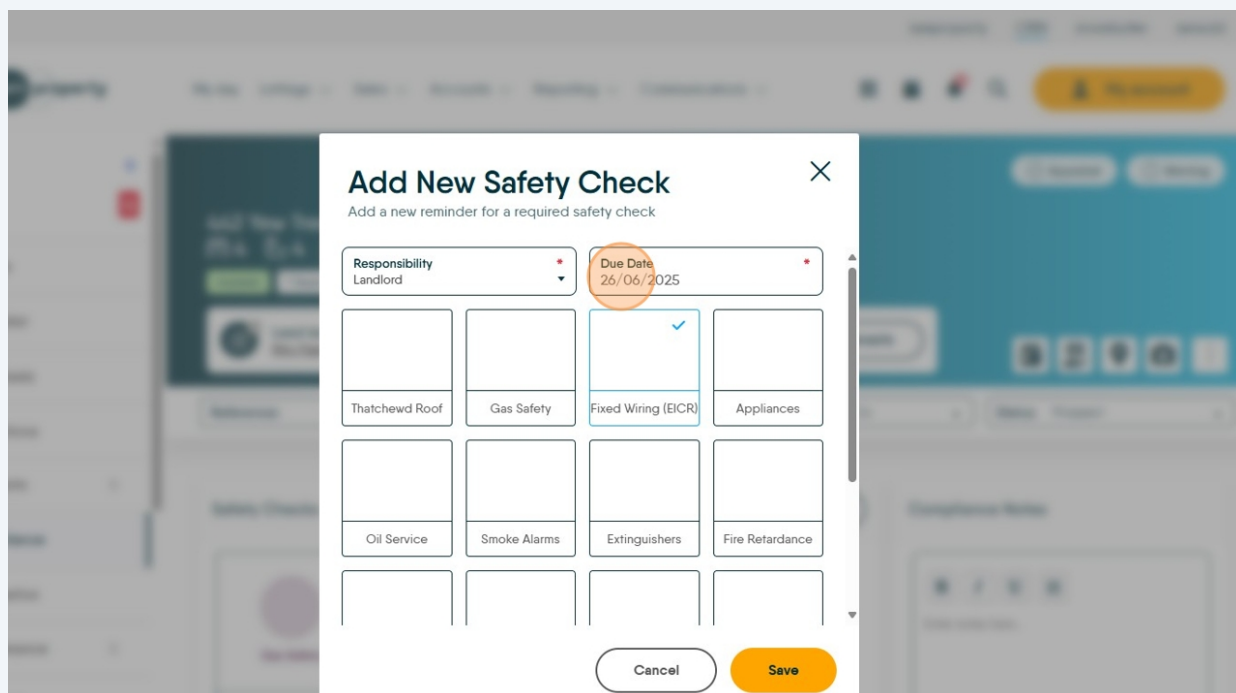
Responsibility: Agent ▼ Due Date: 26/06/2025 ▼

Thatchewd Roof	Gas Safety	Fixed Wiring (EICR)	Appliances
Oil Service	Smoke Alarms	Extinguishers	Fire Retardance

Cancel Save

6

Click the "Select Date" field to set the date the check is next due. Doing this will add the expiry date to the record and will show in various Client Portals and be used in the Activity List to create the notifications.



The screenshot shows a modal window titled "Add New Safety Check" with a subtitle "Add a new reminder for a required safety check". At the top, there are two dropdown menus: "Responsibility" (set to "Landlord") and "Due Date" (set to "26/06/2025"). Below these is a grid of 12 checkboxes for different safety checks. The "Fixed Wiring (EICR)" checkbox is checked with a blue checkmark. At the bottom of the modal are two buttons: "Cancel" and "Save".

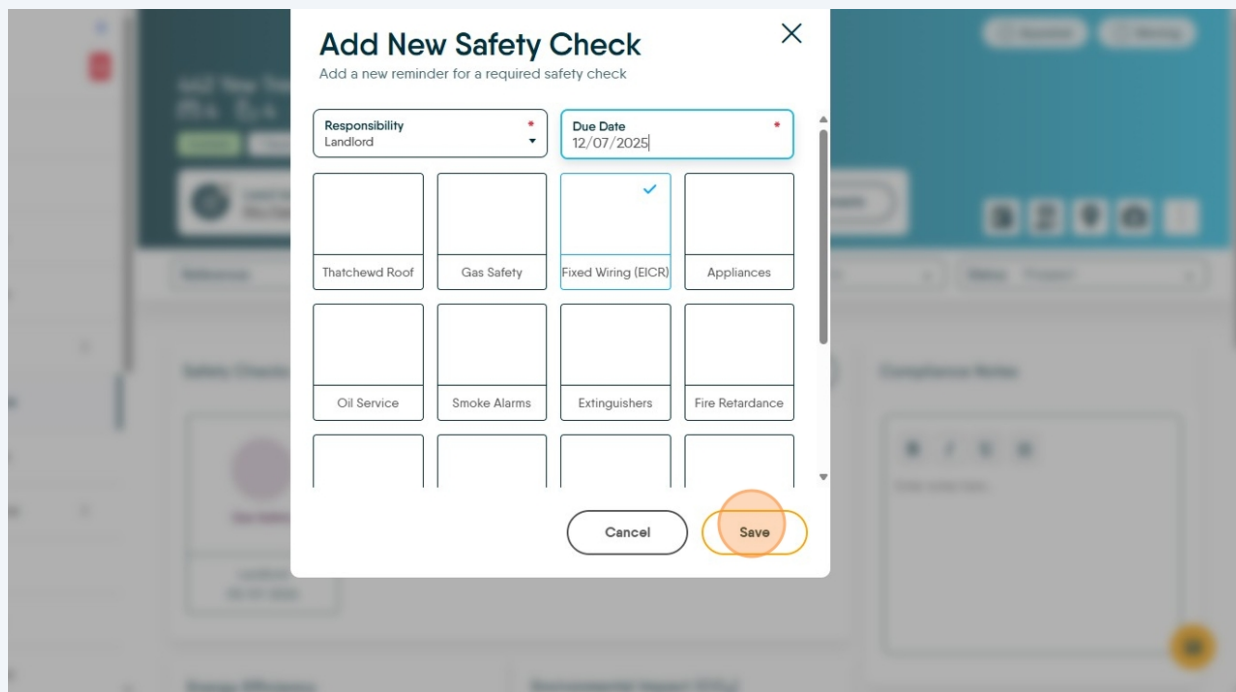
Responsibility	Due Date
Landlord	26/06/2025

Thatchewd Roof	Gas Safety	Fixed Wiring (EICR)	Appliances
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Oil Service	Smoke Alarms	Extinguishers	Fire Retardance
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Buttons: Cancel, Save

7

Once complete. Click "Save"



This screenshot shows the same "Add New Safety Check" modal window. The "Due Date" field now shows "12/07/2025". The "Fixed Wiring (EICR)" checkbox remains checked. The "Save" button at the bottom right is now highlighted with an orange circle, indicating it should be clicked to complete the process.

Responsibility	Due Date
Landlord	12/07/2025

Thatchewd Roof	Gas Safety	Fixed Wiring (EICR)	Appliances
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Oil Service	Smoke Alarms	Extinguishers	Fire Retardance
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Buttons: Cancel, Save

Adding a New Compliance Type

8 Click "Add a new type"

The screenshot shows a property management dashboard for the property "442 Yew Tree Close, Hurworth, Darlington, DL2 2HX". The dashboard includes a header with property details, a sidebar with navigation options, and a main content area. The main content area is divided into several sections: "Safety Checks", "Compliance Notes", "Energy Efficiency", and "Environmental Impact (CO₂)". The "Safety Checks" section contains two cards: "Gas Safety" and "Fixed Wiring (EICR)". The "Compliance Notes" section contains a text area with a placeholder "Enter notes here...". The "Add a new type" button is highlighted with an orange circle.

442 Yew Tree Close, Hurworth, Darlington, DL2 2HX |
4 4 | GBP 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

Safety Checks + Add New + Add a new type

Gas Safety Landlord: 05/07/2024
Fixed Wiring (EICR) Landlord: 12/07/2025

Compliance Notes
Enter notes here...

Energy Efficiency Environmental Impact (CO₂)

9 Click the "Enter check name" field. This is the name of your new compliance check.

The screenshot shows a modal form titled "Add New Safety Check". The form has a close button (X) in the top right corner. Below the title is a subtitle: "Add a new reminder for a required safety check". The form contains a text input field labeled "Check name" with a placeholder "Enter check name". Below the input field is a grid of buttons for selecting a safety check type. The buttons are arranged in two rows: Gas, Wiring, Appliances, Oil; Smoke, Extinguisher, Fire, Carbon. At the bottom of the form are two buttons: "Cancel" and "Save". The "Enter check name" field is highlighted with an orange circle.

Add New Safety Check X
Add a new reminder for a required safety check

Check name
Enter check name

Gas Wiring Appliances Oil
Smoke Extinguisher Fire Carbon

Cancel Save

10 Select an icon to use.

Add New Safety Check ×

Add a new reminder for a required safety check

Check name
Thatched Roof

Gas	Wiring	Appliances	Oil
Smoke	Extinguisher	Fire	Carbon

Cancel Save

11 Click "Save" this is the new compliance created

Add New Safety Check ×

Add a new reminder for a required safety check

Check name
Thatched Roof

Gas	Wiring	Appliances	Oil
Smoke	Extinguisher	Fire	Carbon

Cancel Save

12 Click "Add New" to select and set the new compliance

The screenshot shows a property management dashboard for the property '442 Yew Tree Close, Hurworth, Darlington, DL2 2HX'. The dashboard includes a sidebar with navigation options like 'Details', 'Checklist', 'Appraisals', 'Sections', 'Accounts', 'Compliance', 'Information', 'Maintenance', 'Payment', 'Marketing', and 'Property Control'. The main area displays property details: 'Available', '1 Tenant', 'Lead landlord: Mrs Pamela Green', and 'Lead tenant: Mr Horatio Morgan'. Below this, there are fields for 'Reference:', 'Negotiator: David-George Morgan', 'Branch: Morgan & Co', and 'Status: Prospect'. The 'Safety Checks' section is highlighted, showing two existing checks: 'Gas Safety' (Landlord: 05/07/2024) and 'Fixed Wiring (EICR)' (Landlord: 12/07/2025). A red circle highlights the '+ Add New' button. To the right, there is a 'Compliance Notes' section with a text area and formatting options (B, I, U, and a grid icon).

13 Click the new compliance option.

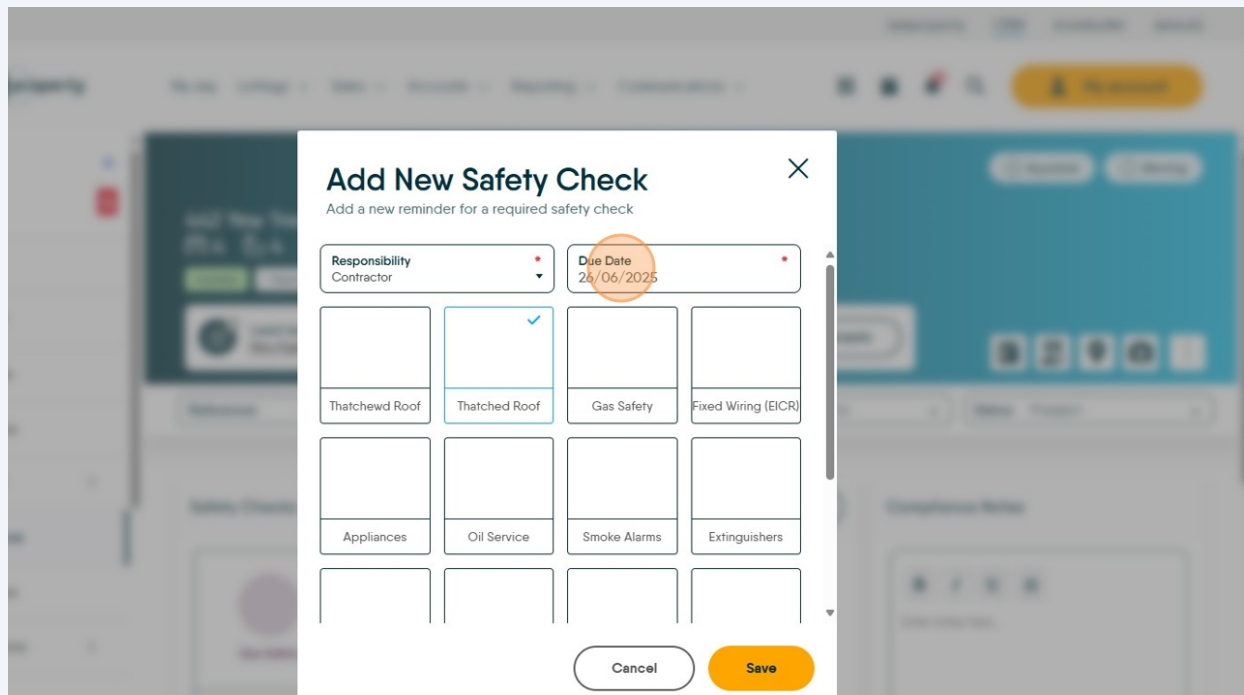
The screenshot shows a modal form titled 'Add New Safety Check' with the subtitle 'Add a new reminder for a required safety check'. The form has a close button (X) in the top right corner. It contains two dropdown menus: 'Responsibility' (set to 'Agent') and 'Due Date' (set to '26/06/2025'). Below these are four columns of checkboxes for different safety checks: 'Thatched Roof', 'Gas Safety', 'Fixed Wiring (EICR)', 'Appliances', 'Oil Service', 'Smoke Alarms', and 'Extinguishers'. A red circle highlights the 'Thatched Roof' checkbox. At the bottom of the modal are 'Cancel' and 'Save' buttons.

14 Click "Responsibility" to set who is responsible for the checks completion

The screenshot shows a web application interface with a modal window titled "Add New Safety Check". The modal has a subtitle "Add a new reminder for a required safety check". At the top left of the modal is a "Responsibility" dropdown menu with "Agent" selected, and at the top right is a "Due Date" field with "26/06/2025". Below these are two rows of four checkboxes each. The first row contains "Thatchewd Roof", "Thatched Roof" (which is checked with a blue checkmark), "Gas Safety", and "Fixed Wiring (EICR)". The second row contains "Appliances", "Oil Service", "Smoke Alarms", and "Extinguishers". At the bottom of the modal are "Cancel" and "Save" buttons. An orange circle highlights the "Responsibility" dropdown menu.

This screenshot shows the same "Add New Safety Check" modal, but the "Responsibility" dropdown menu is expanded. It shows three options: "Agent", "Landlord", and "Contractor". The "Contractor" option is highlighted with an orange circle. The "Due Date" field remains "26/06/2025". The checkboxes for "Thatched Roof", "Gas Safety", "Fixed Wiring (EICR)", "Appliances", "Oil Service", "Smoke Alarms", and "Extinguishers" are visible. The "Cancel" and "Save" buttons are at the bottom.

- 15 Click the "Select Date" field and set the due date.



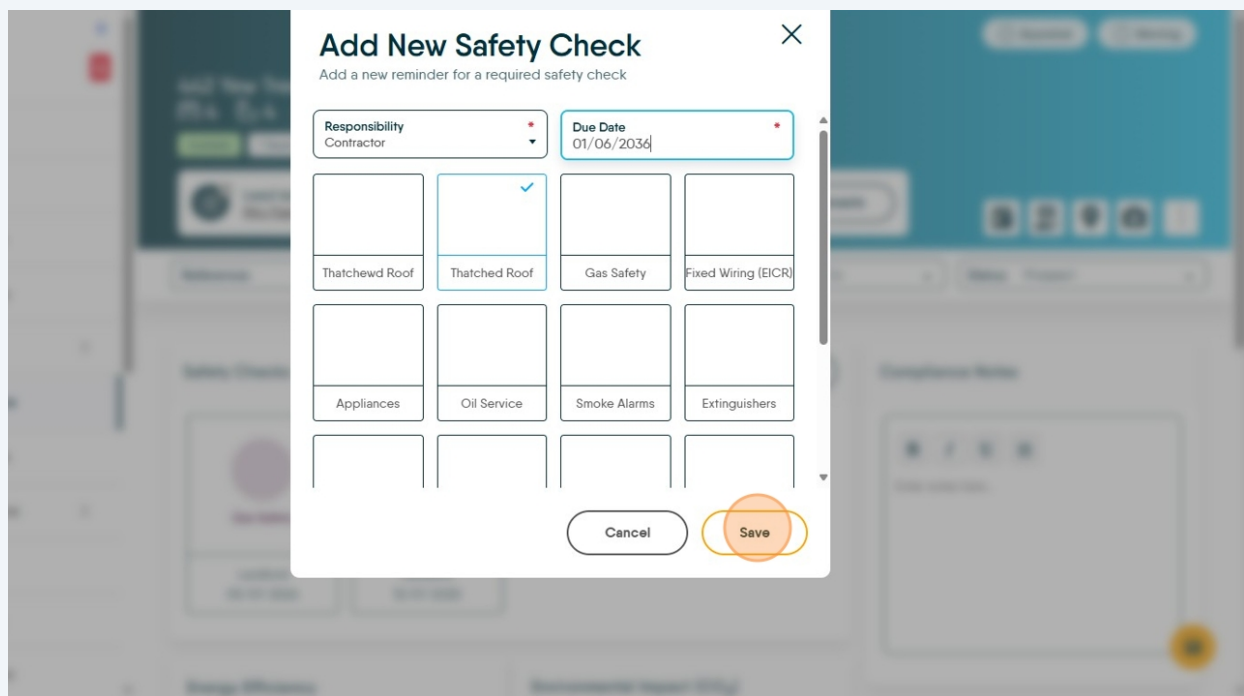
The screenshot shows a modal window titled "Add New Safety Check" with the subtitle "Add a new reminder for a required safety check". At the top left, there is a dropdown menu for "Responsibility" with "Contractor" selected. To its right is a "Due Date" field containing "26/06/2025", which is circled in orange. Below these fields is a grid of 12 checkboxes for different safety checks. The "Thatched Roof" checkbox is checked and highlighted with a blue border. The other checkboxes are labeled: "Thatchewd Roof", "Gas Safety", "Fixed Wiring (EICR)", "Appliances", "Oil Service", "Smoke Alarms", and "Extinguishers". At the bottom of the modal are two buttons: "Cancel" and "Save".

Responsibility	Due Date
Contractor	26/06/2025

<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Thatchewd Roof	Thatched Roof	Gas Safety	Fixed Wiring (EICR)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Appliances	Oil Service	Smoke Alarms	Extinguishers
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Cancel Save

- 16 Click "Save"



This screenshot is identical to the previous one, but the "Save" button at the bottom right is circled in orange, indicating it should be clicked.

Responsibility	Due Date
Contractor	01/06/2036

<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Thatchewd Roof	Thatched Roof	Gas Safety	Fixed Wiring (EICR)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Appliances	Oil Service	Smoke Alarms	Extinguishers
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Cancel Save

Updating a Compliance Check

17 Click here.

Live Jobs 0

EPC Rating G

Details

Checklist

Appraisals

Inspections

Accounts >

Compliance

Information

maintenance >

Payment

Marketing

Key Control

442 Yew Tree Close, Hurworth, Darlington, DL2 2HX | 4 4 | GBP 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

Safety Checks

+ Add New + Add a new type

Gas Safety

Landlord 05/07/2024

Fixed Wiring (EICR)

Landlord 12/07/2025

Thatched Roof

Contractor 01/06/2036

Compliance Notes

B I U

Enter notes here...

Energy Efficiency

Environmental Impact (CO₂)

18 Click "Edit"

Live Jobs 0

EPC Rating G

Details

Checklist

Appraisals

Inspections

Accounts >

Compliance

Information

maintenance >

Payment

Marketing

Key Control

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

Available 1 Tenant

Lead landlord: Mrs Pamela Green View Landlords

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

Safety Checks

+ Add New + Add a new type

Gas Safety

Landlord 05/07/2024

Fixed Wiring (EICR)

Landlord 12/07/2025

Thatched Roof

Contractor 01/06/2036

Compliance Notes

B I U

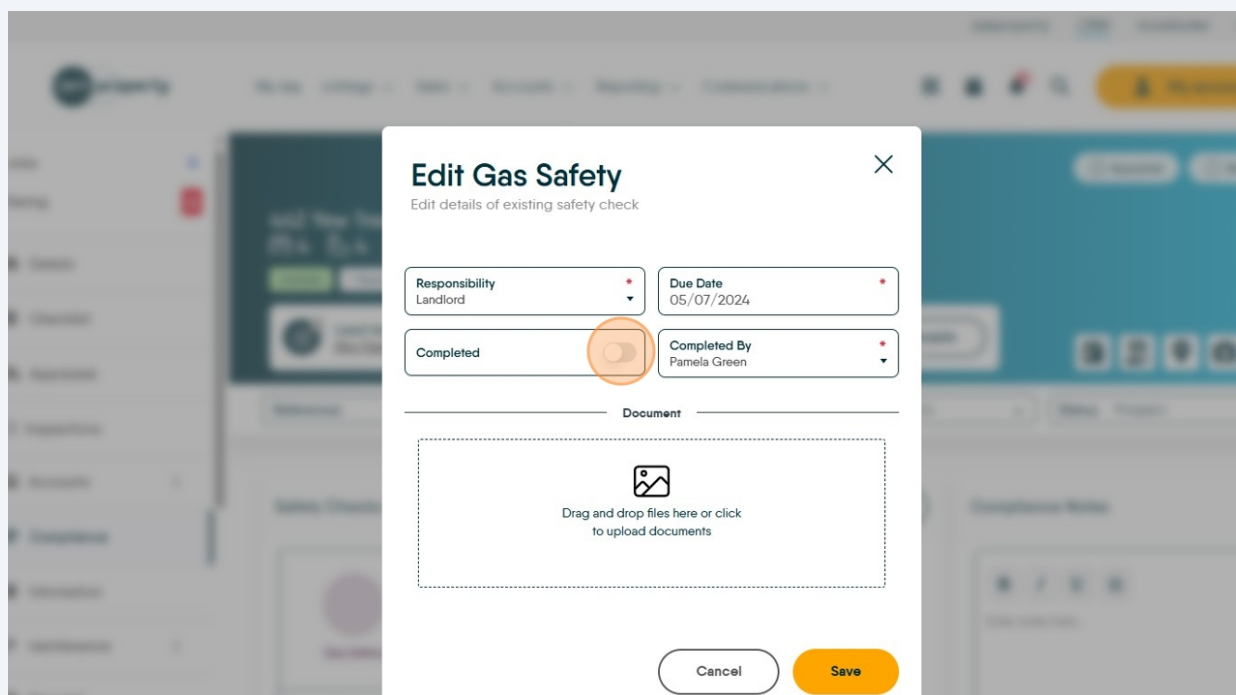
Enter notes here...

Energy Efficiency

Environmental Impact (CO₂)

19

Click here to mark the the check completed. The 'Completed By' field is completed automatically based on who has responsibility.



The screenshot shows a web application interface with a modal window titled "Edit Gas Safety". The modal has a close button (X) in the top right corner. Below the title, it says "Edit details of existing safety check". The form contains several fields:

- Responsibility:** A dropdown menu with "Landlord" selected.
- Due Date:** A text field with the date "05/07/2024".
- Completed:** A toggle switch that is currently turned on (indicated by an orange circle and a white dot).
- Completed By:** A dropdown menu with "Pamela Green" selected.

Below these fields is a section labeled "Document" with a dashed border and a placeholder icon. It contains the text: "Drag and drop files here or click to upload documents". At the bottom of the modal are two buttons: "Cancel" and "Save".

20

There will now be a new option to 'Schedule the Next Check' click this and for standard checks the 'Next Due Date' will be automatically set using the current legal limits. Click here.

To add the supporting documents/certificates click into the Documents field and find your document. This can also be done in the Documents folder for the property

The screenshot shows a modal window titled "Edit Gas Safety" with the subtitle "Edit details of existing safety check". The form contains several fields: "Responsibility" (Landlord), "Due Date" (05/07/2024), "Completed" (toggle), "Completed By" (Pamela Green), "Schedule Next Check" (toggle, highlighted with an orange circle), and "Next Due Date" (05/07/2025). Below these fields is a "Document" section with a dashed box and the text "Drag and drop files here or click to upload documents". At the bottom are "Cancel" and "Save" buttons.

21

Click "Save"

This screenshot is identical to the previous one, showing the "Edit Gas Safety" modal. In this step, the "Save" button at the bottom right is highlighted with an orange circle, indicating the final action to be taken.

22 The date will show as updated on the tile and will update the Activity List.

Live Jobs 0

EPC Rating G

Details

Checklist

Appraisals

Inspections

Accounts >

Compliance

Information

Maintenance >

Payment

Marketing

Key Control

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Available 1 Tenant

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Safety Checks

+ Add New + Add a new type

Gas Safety

Landlord 05/07/2025

Fixed Wiring (EICR)

Landlord 12/07/2025

Thatched Roof

Contractor 01/06/2036

Compliance Notes

B I U

Enter notes here...

Energy Efficiency Environmental Impact (CO₂)

23 Click "Enter notes here..."

Appraisal Warning

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

Available 1 Tenant

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Safety Checks

+ Add New + Add a new type

Gas Safety

Landlord 05/07/2025

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Landlord 12/07/2025

Thatched Roof

Contractor 01/06/2036

Compliance Notes

B I U

Enter notes here...

Energy Efficiency Environmental Impact (CO₂)