

Adding Compliance Checks in CRM System



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.

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

Available 1 Tenant

Lead landlord: Mrs Pamela Green View Landlords

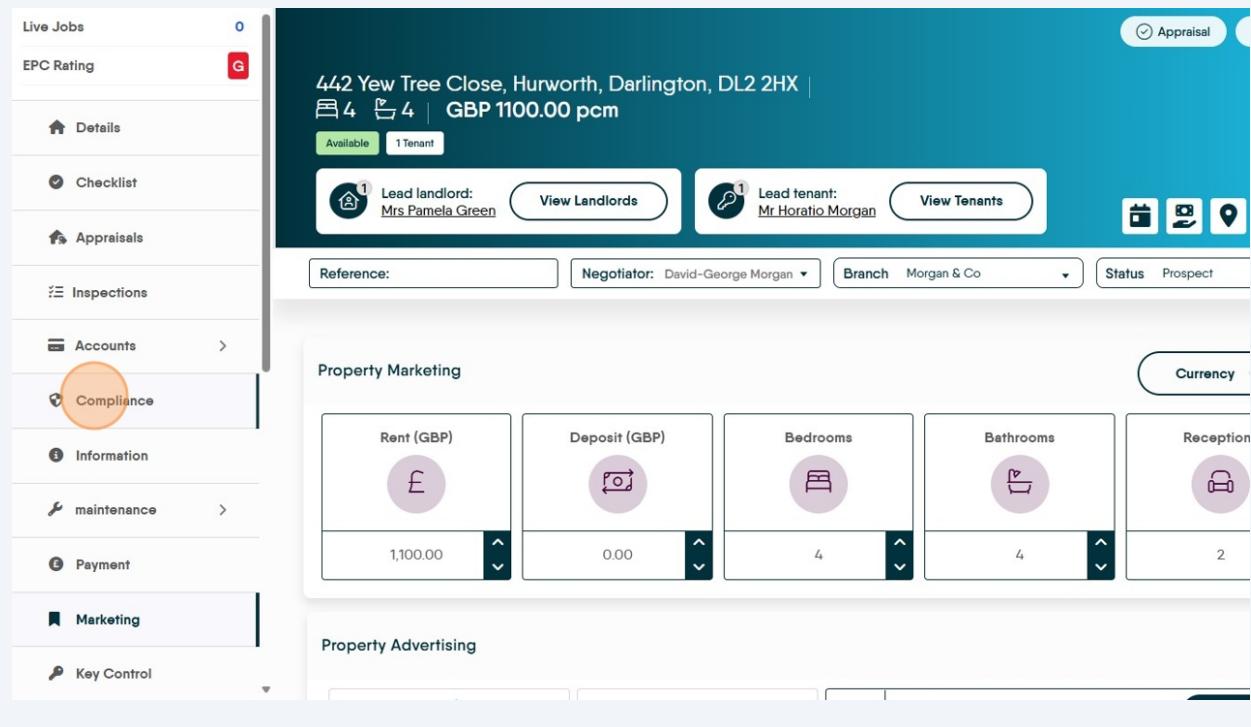
Lead tenant: Mr Horatio Morgan View Tenants

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

Currency GBP

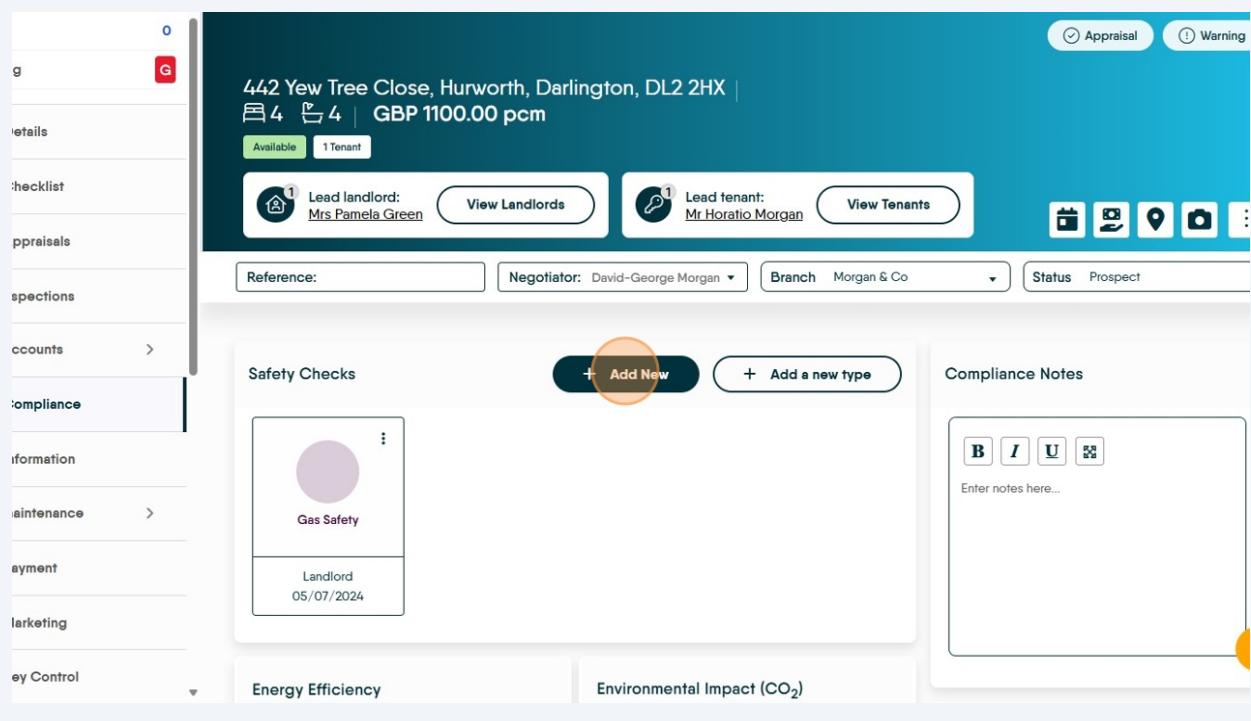
Property Marketing
Rent (GBP) £ 1,100.00
Deposit (GBP) 0.00
Bedrooms 4
Bathrooms 4
Receptions 2

2 Click "Compliance"



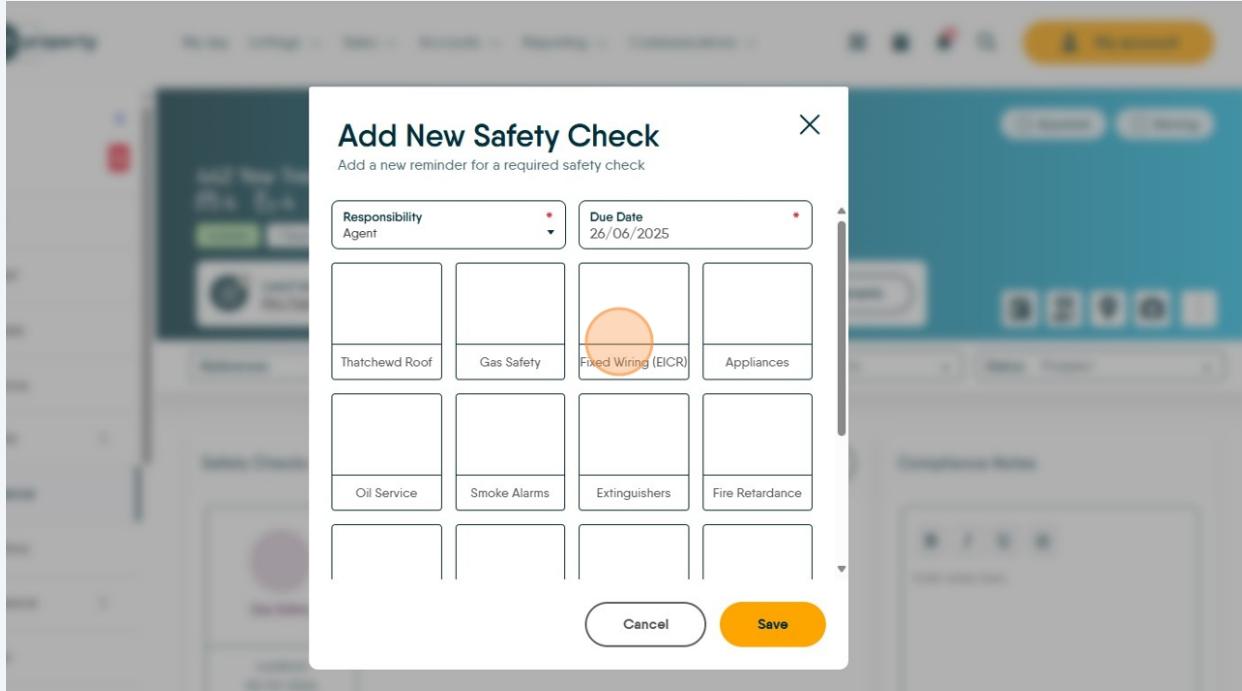
The screenshot shows a property management software interface. On the left, a sidebar lists various sections: Live Jobs (0), EPC Rating (G), Details, Checklist, Appraisals, Inspections, Accounts, Compliance (highlighted with an orange circle), Information, maintenance, Payment, Marketing, and Key Control. The main content area displays a property listing for 442 Yew Tree Close, Hurworth, Darlington, DL2 2HX. The listing includes 4 bedrooms, 4 bathrooms, and a rent of GBP 1100.00 pcm. It shows an 'Available' status and 1 tenant. Below the listing, there are sections for Lead landlord (Mrs Pamela Green) and Lead tenant (Mr Horatio Morgan), with 'View Landlords' and 'View Tenants' buttons. The 'Property Marketing' section shows rent (1,100.00 GBP), deposit (0.00 GBP), bedrooms (4), bathrooms (4), and reception (2). The 'Property Advertising' section is partially visible at the bottom.

3 Click "Add New"

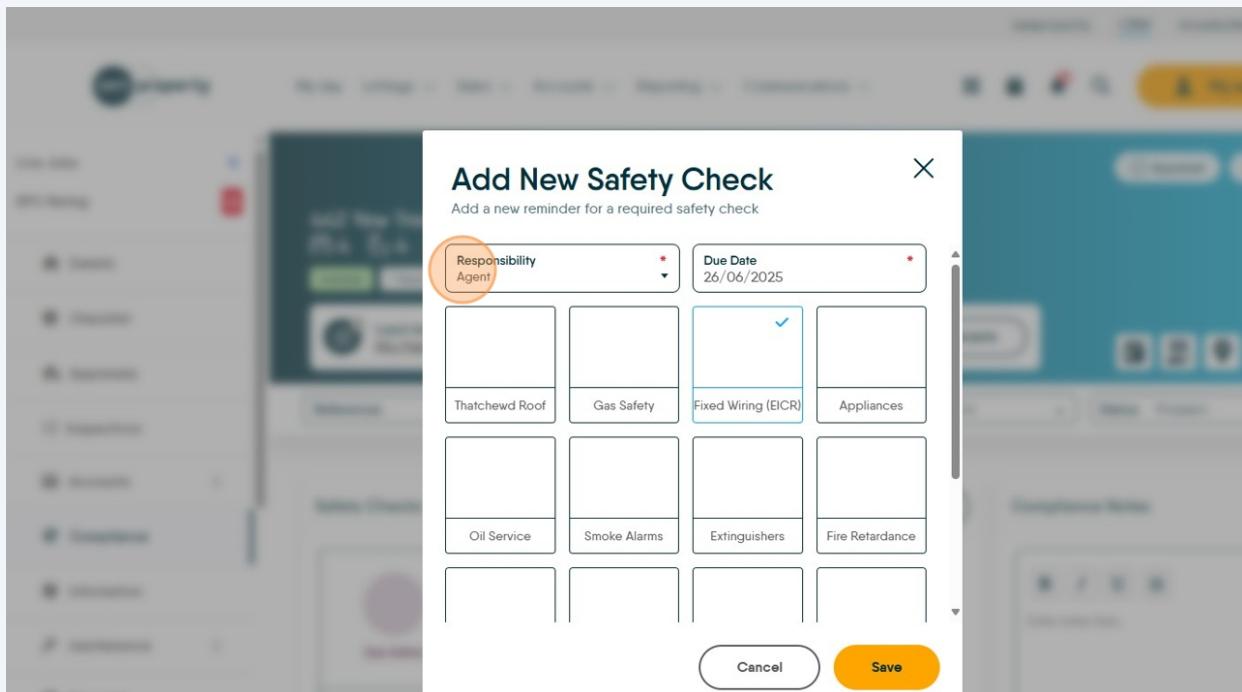


The screenshot shows the same property management software interface as the previous one, but with the 'Safety Checks' section highlighted. The sidebar and property listing are identical. The 'Safety Checks' section shows a card for 'Gas Safety' with a date of 'Landlord 05/07/2024'. To the right of this card is a button labeled '+ Add New' (highlighted with an orange circle), and below it is another button labeled '+ Add a new type'. To the right of the 'Safety Checks' section is a 'Compliance Notes' section with a text area and icons for B, I, U, and a checklist. At the bottom of the screen, there are tabs for 'Energy Efficiency' and 'Environmental Impact (CO₂)'.

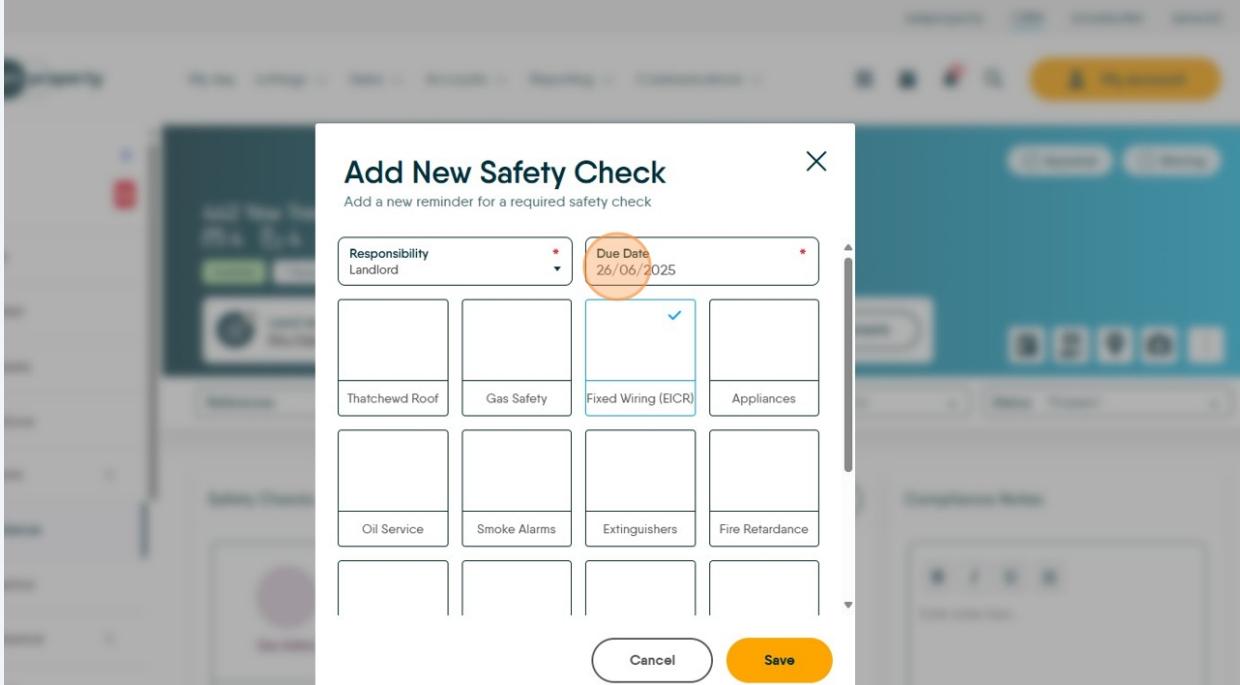
4 From the options on screen select the type of check you are adding e.g. Click the "Fixed Wiring (EICR)" field.



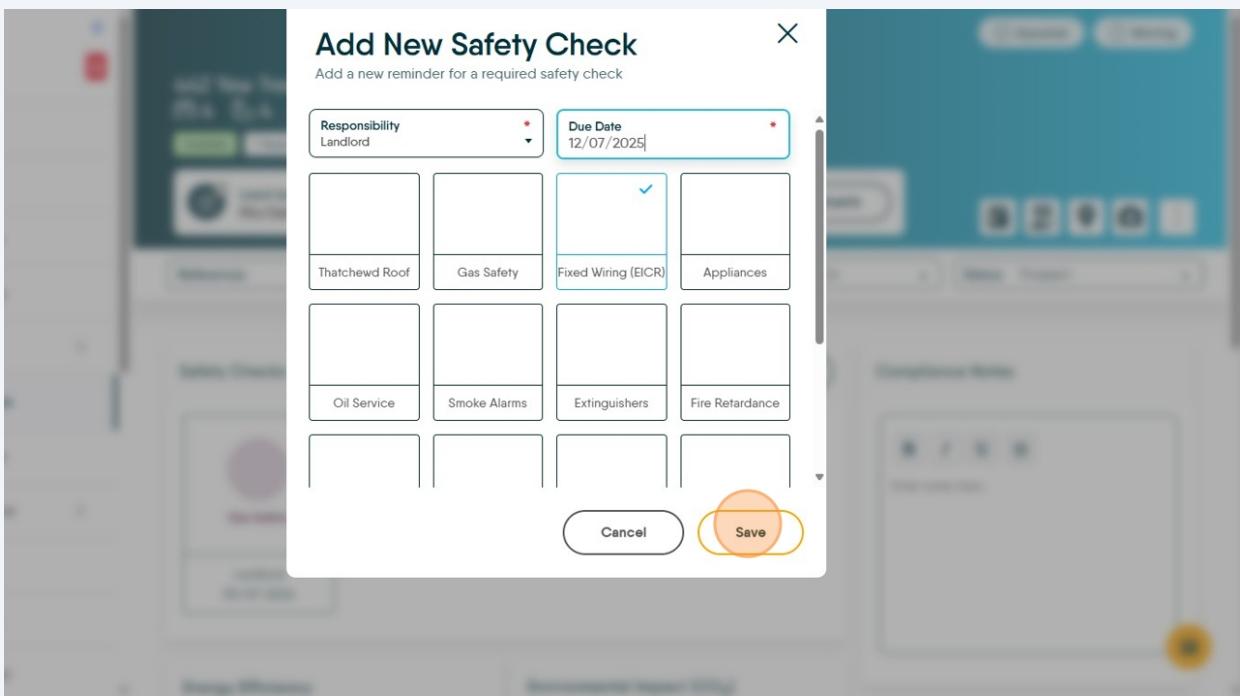
5 Click "Responsibility" from the menu and select who is responsible for the Safety checks completion. Options are Agent, Landlord, Contractor.



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.

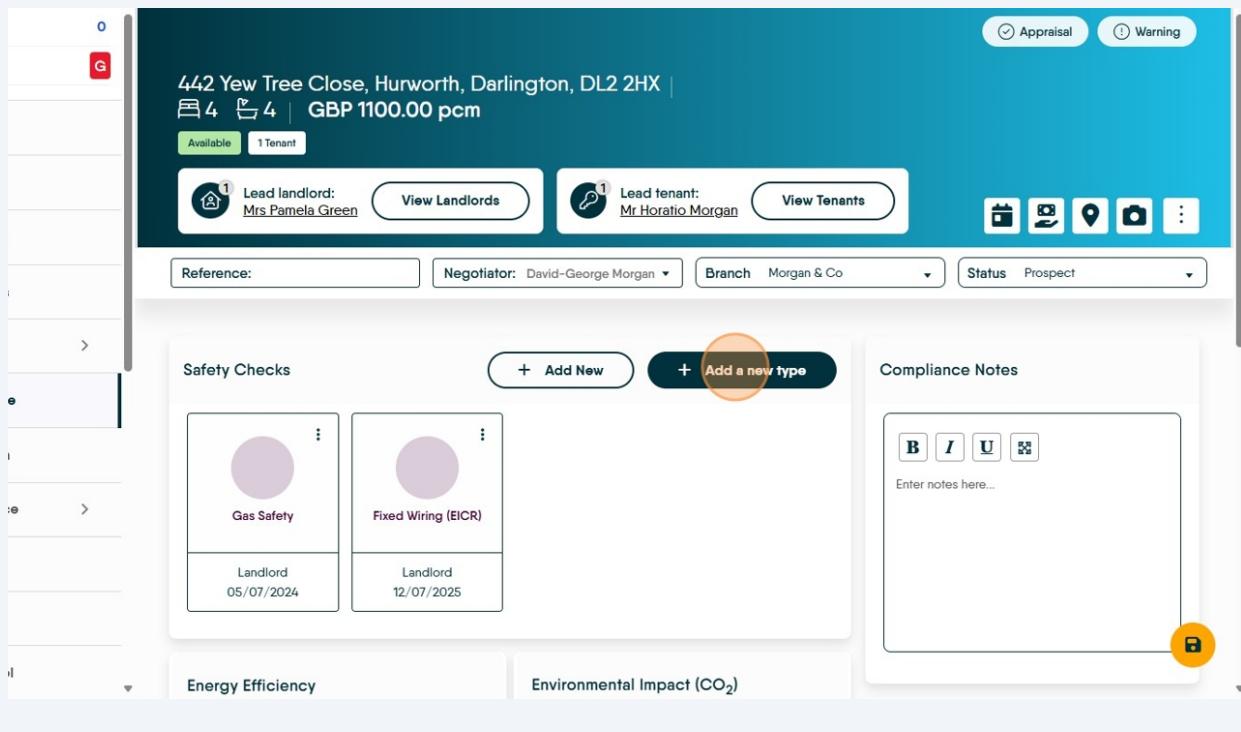


7 Once complete. Click "Save"

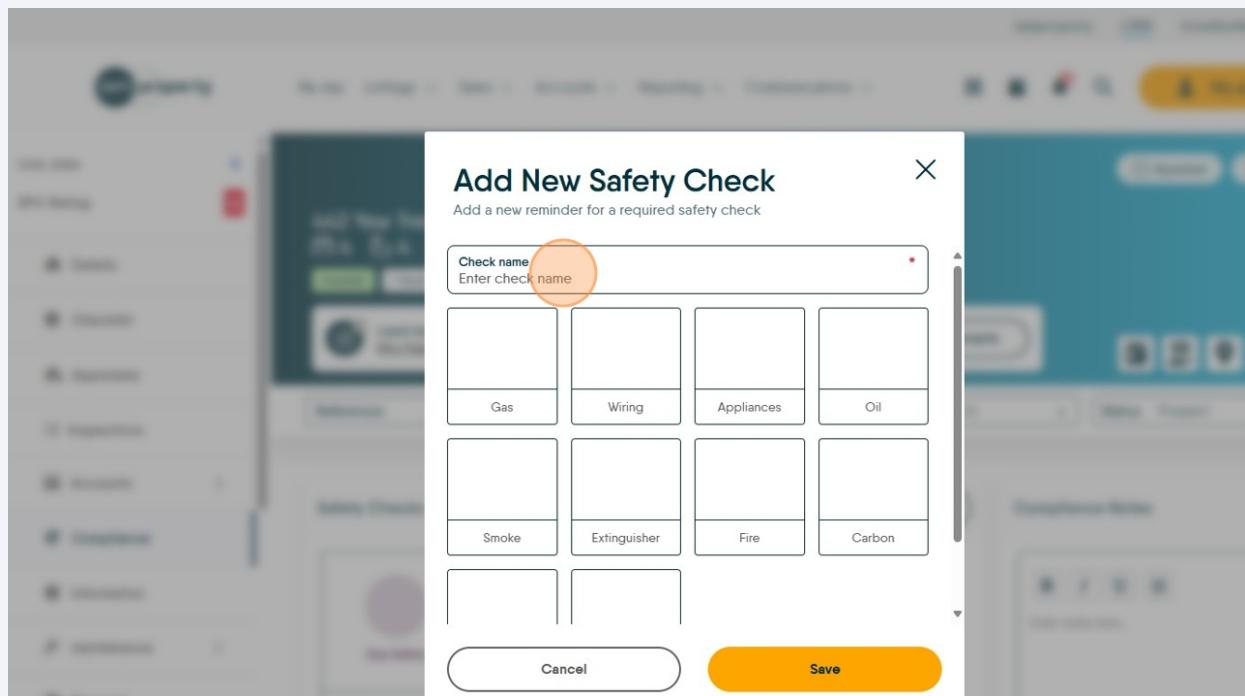


Adding a New Compliance Type

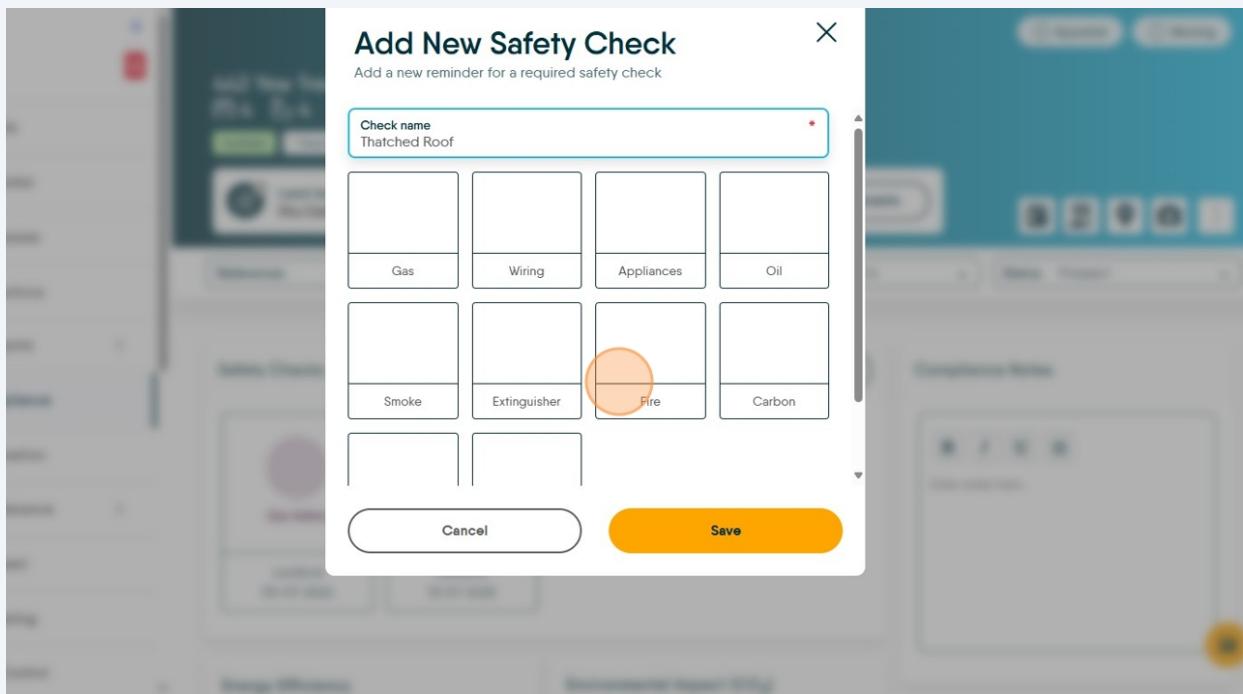
8 Click "Add a new type"



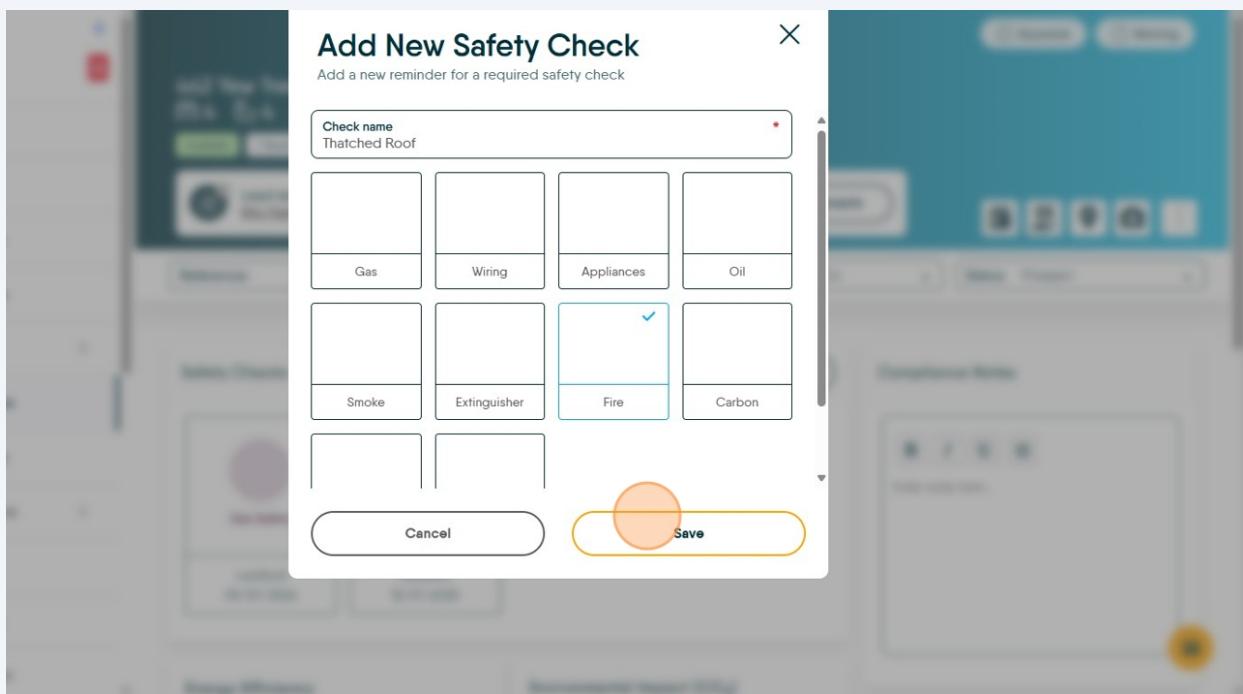
9 Click the "Enter check name" field. This is the name of your new compliance check.



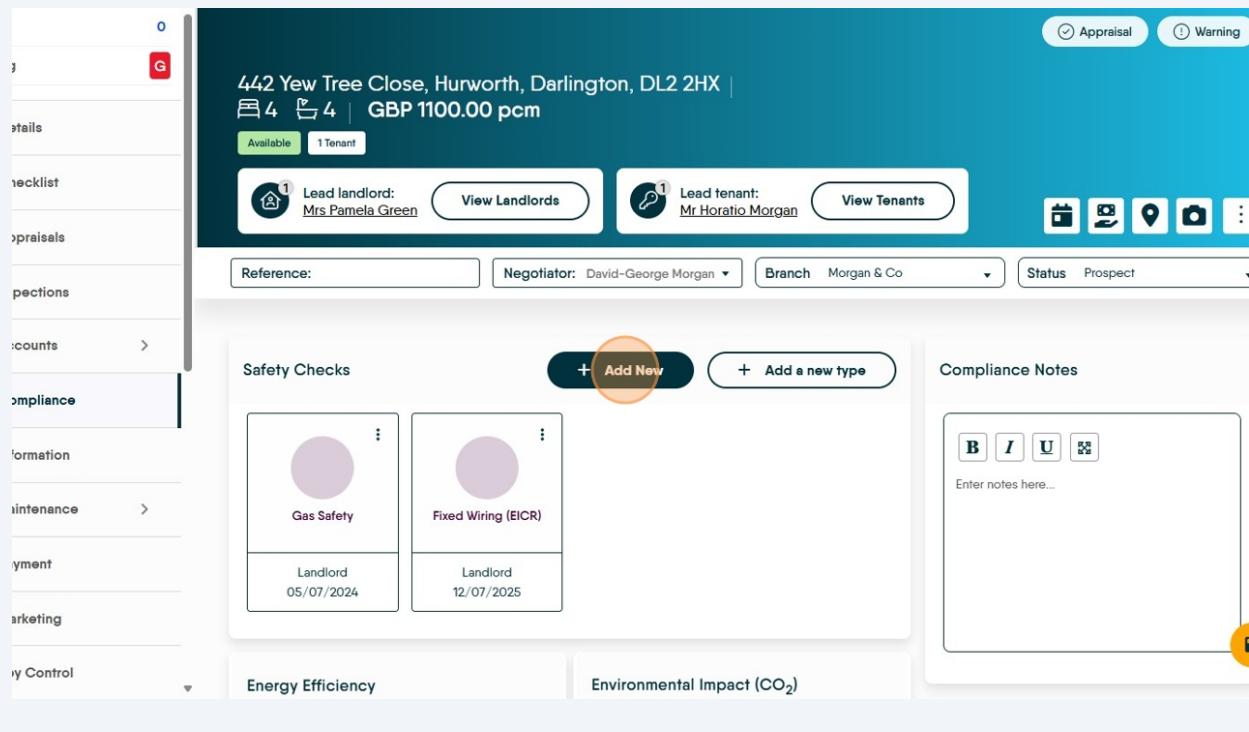
10 Select an icon to use.



11 Click "Save" this is the new compliance created



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



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 Fixed Wiring (EICR)

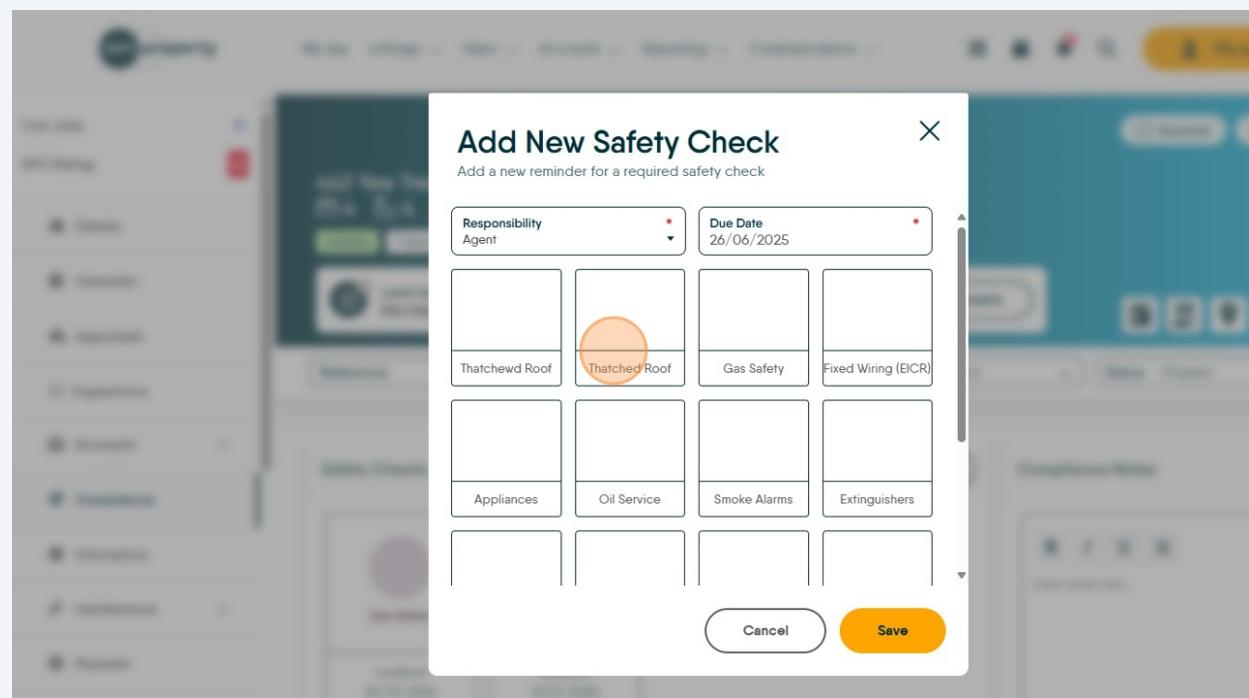
Landlord 05/07/2024 Landlord 12/07/2025

Compliance Notes

B I U

Enter notes here...

13 Click the new compliance option.



Add New Safety Check

Add a new reminder for a required safety check

Responsibility Agent Due Date 26/06/2025

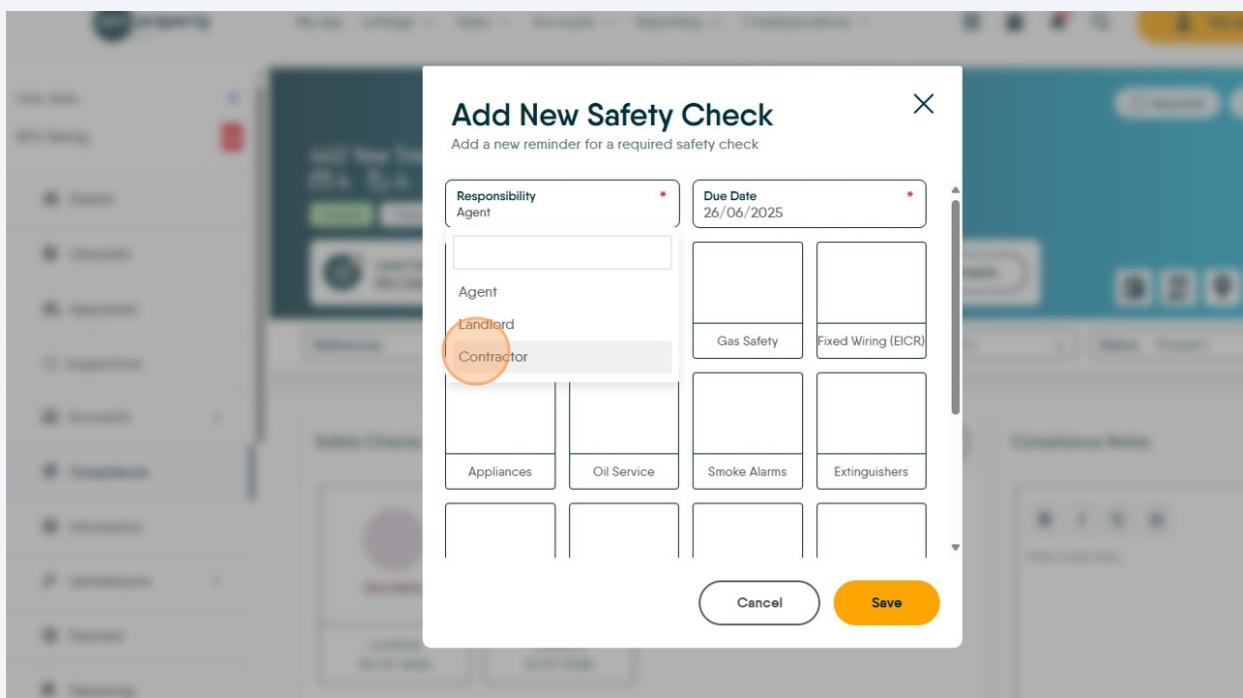
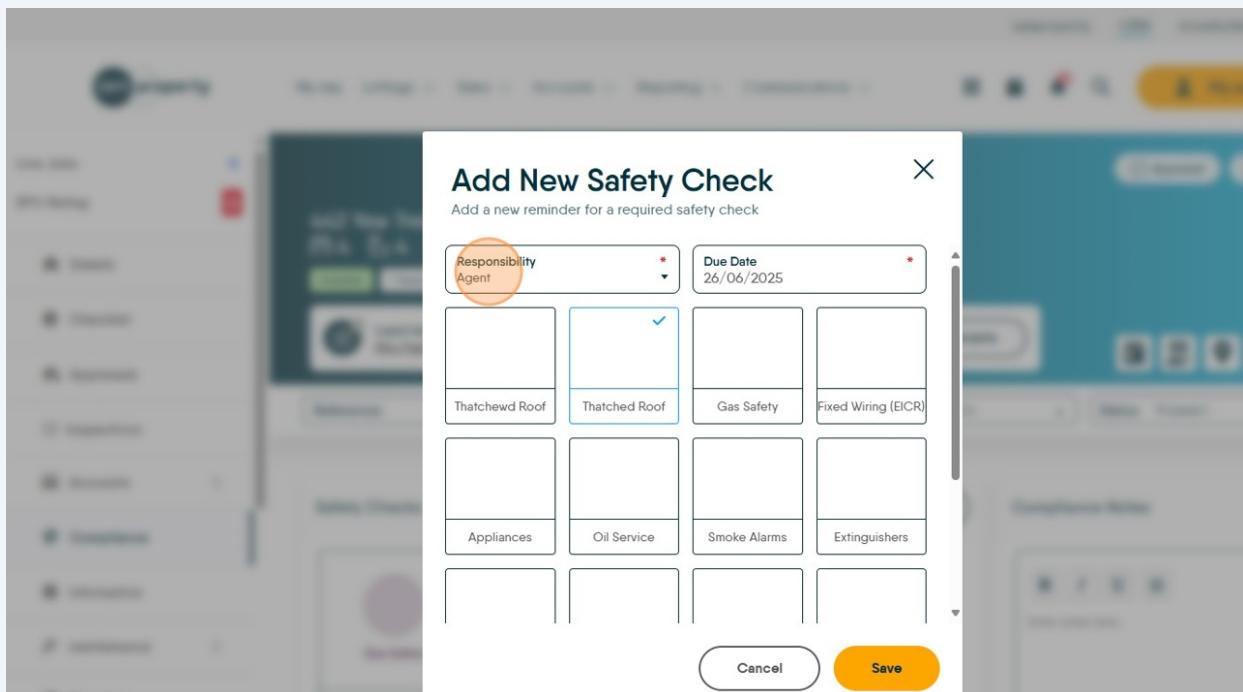
Thatched Roof Gas Safety Fixed Wiring (EICR)

Appliances Oil Service Smoke Alarms Extinguishers

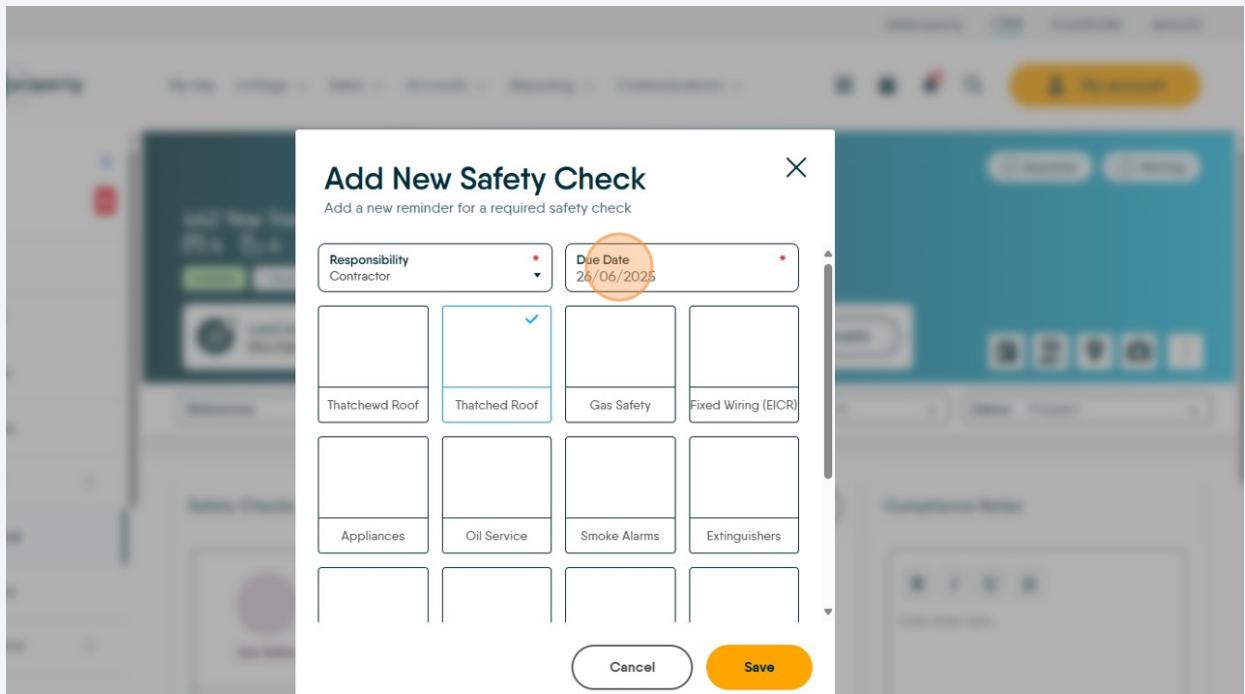
Cancel Save

14

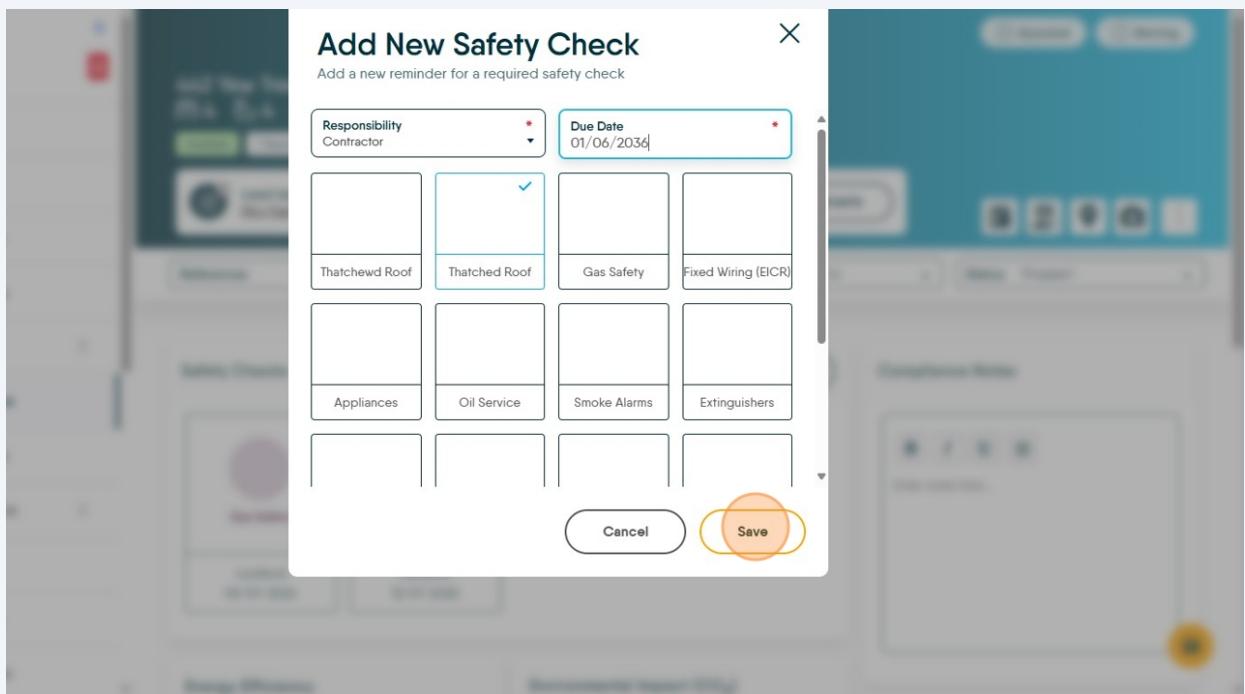
Click "Responsibility" to set who is responsible for the checks completion



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

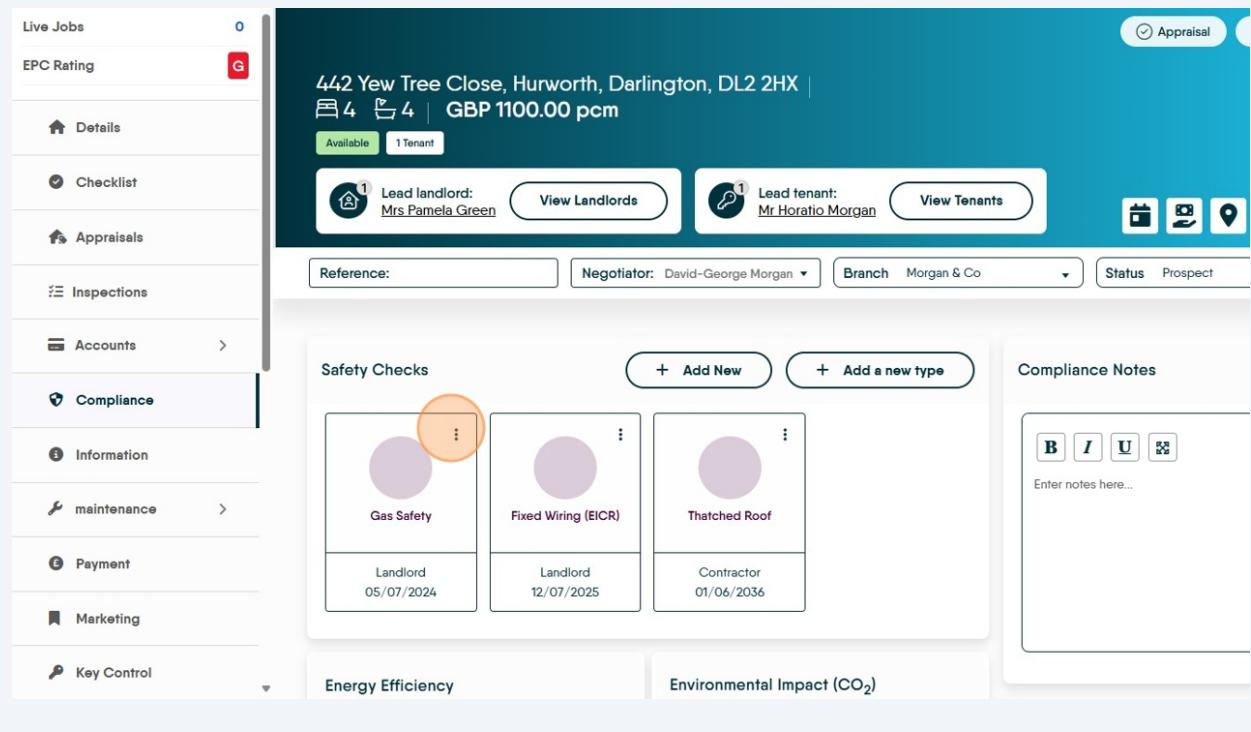


16 Click "Save"



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

Appraisal

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

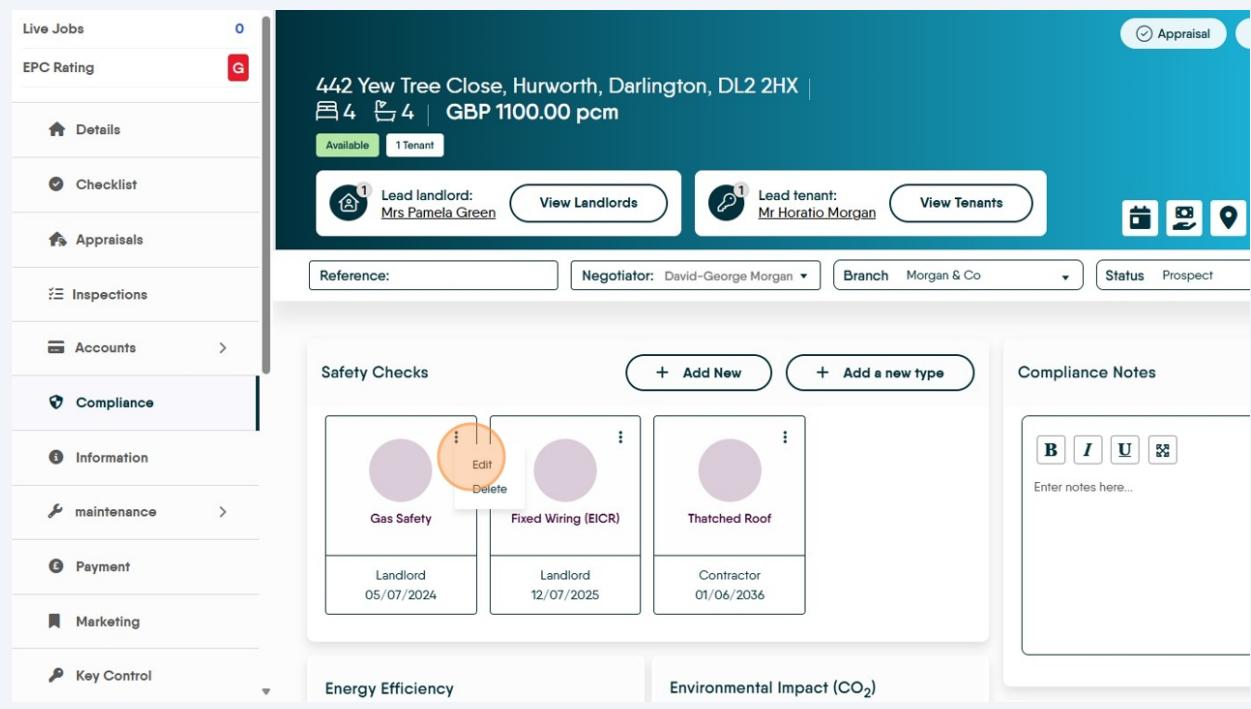
Reference: Negotiator: David-George Morgan Branch Morgan & Co Status Prospect

Safety Checks + Add New + Add a new type

Gas Safety	Fixed Wiring (EICR)	Thatched Roof
Landlord 05/07/2024	Landlord 12/07/2025	Contractor 01/06/2036

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

Appraisal

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

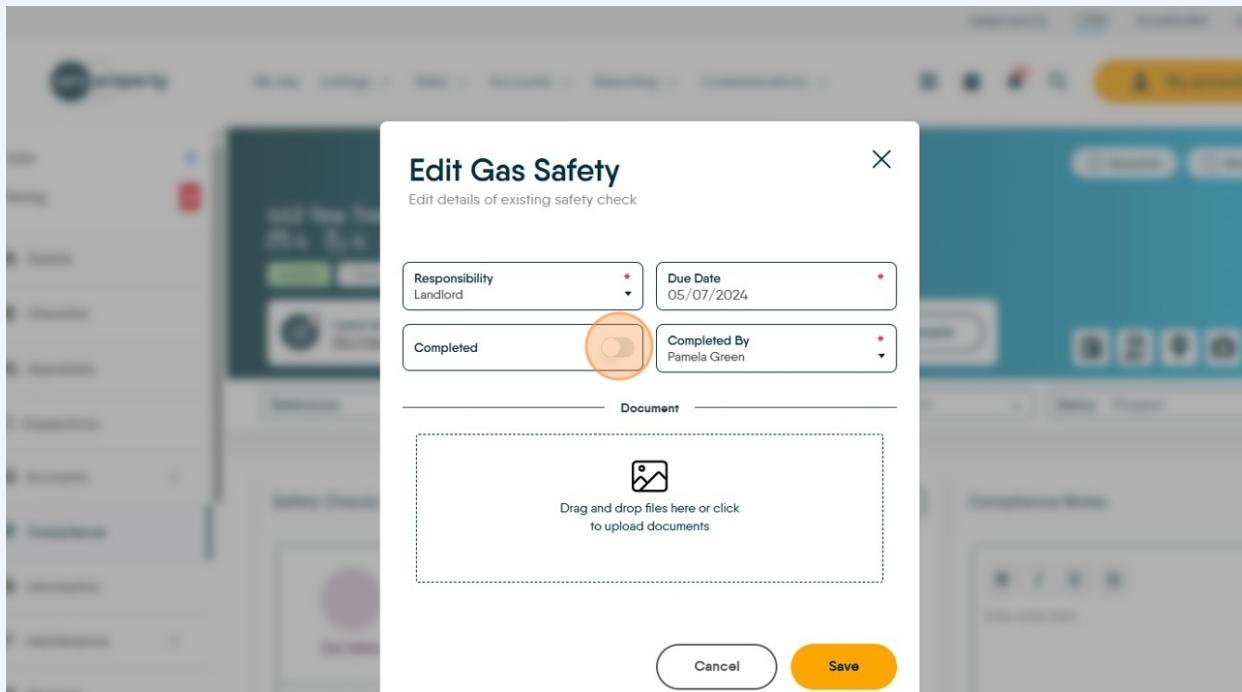
Safety Checks + Add New + Add a new type

Gas Safety	Fixed Wiring (EICR)	Thatched Roof
Landlord 05/07/2024	Landlord 12/07/2025	Contractor 01/06/2036

Energy Efficiency Environmental Impact (CO₂)

19

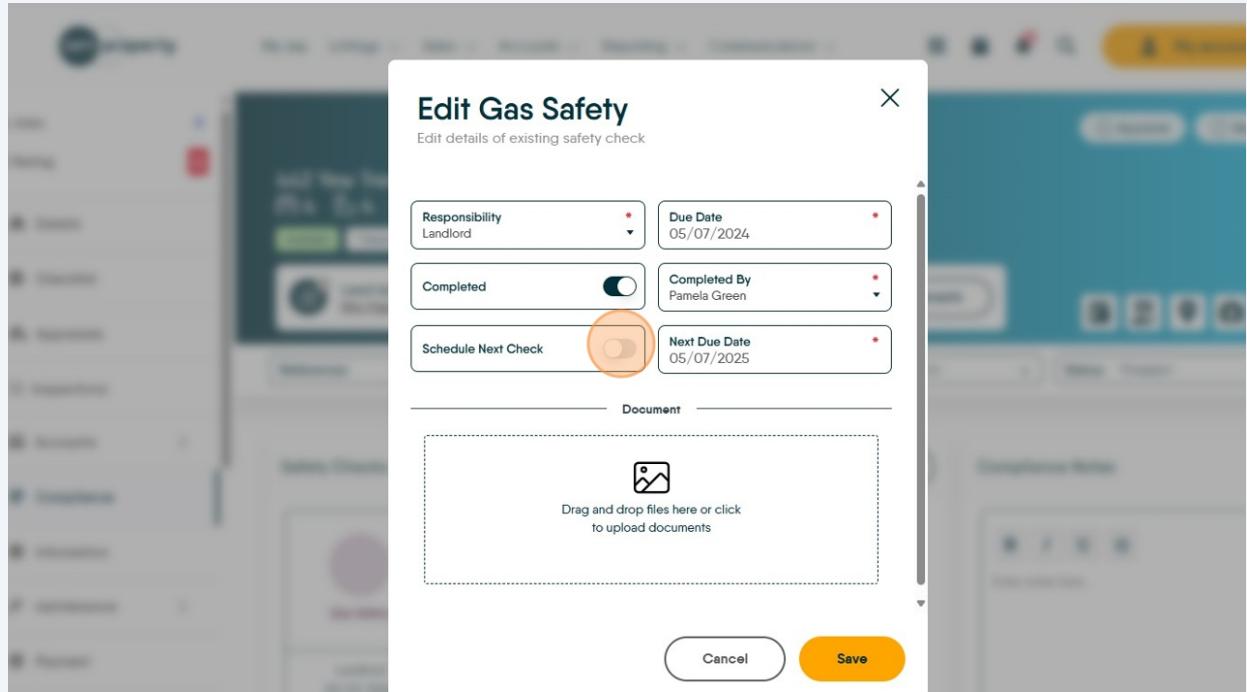
Click here to mark the the check completed. The 'Completed By' field is completed automatically based on who has responsibility.



20

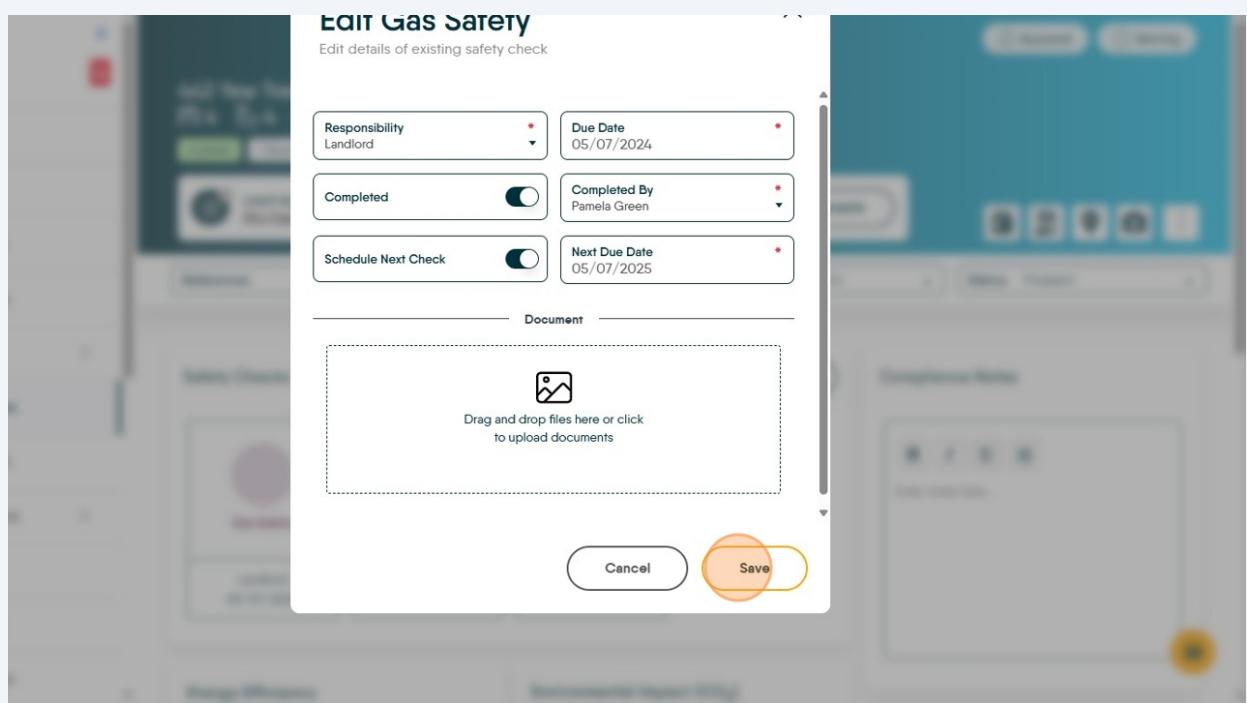
There will now be a new option to 'Schedule the Next Check' click this and for standard checks the 'Next Due Date' will be automatically set using the current legal limits. Click here.

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

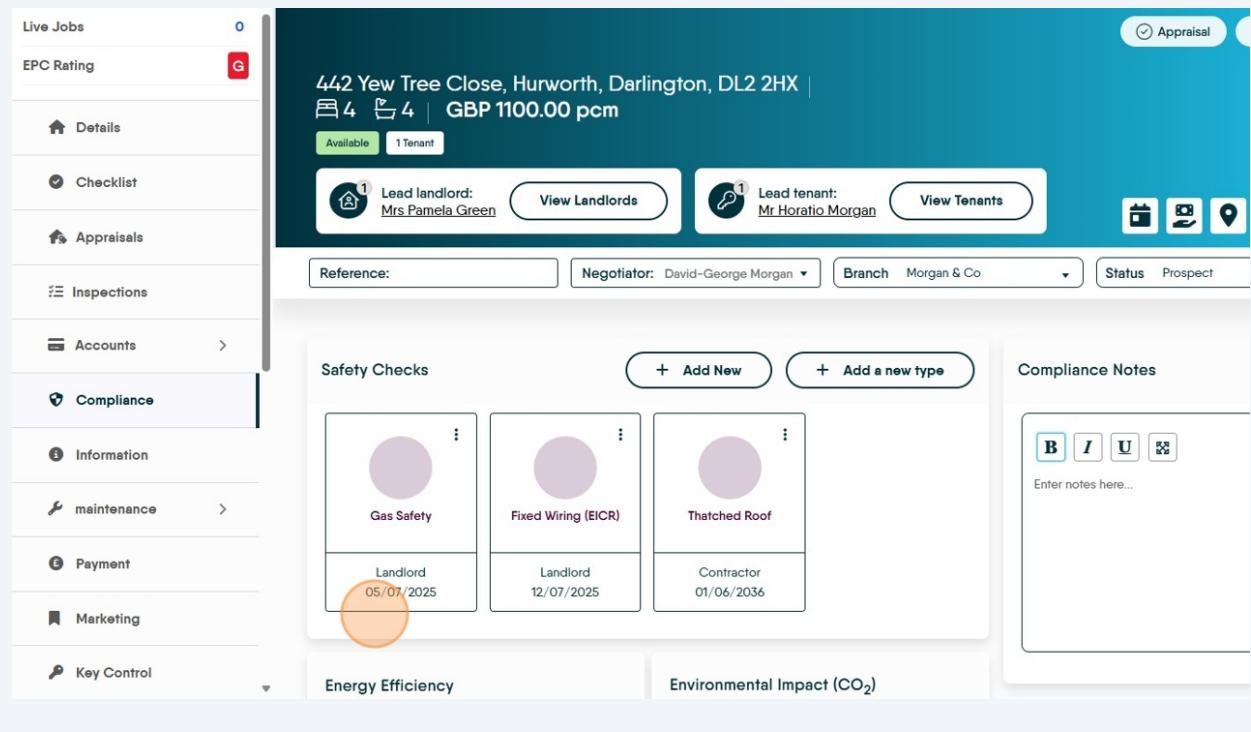


21

Click "Save"



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

Appraisal

442 Yew Tree Close, Hurworth, Darlington, DL2 2HX |
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Safety Checks + Add New + Add a new type

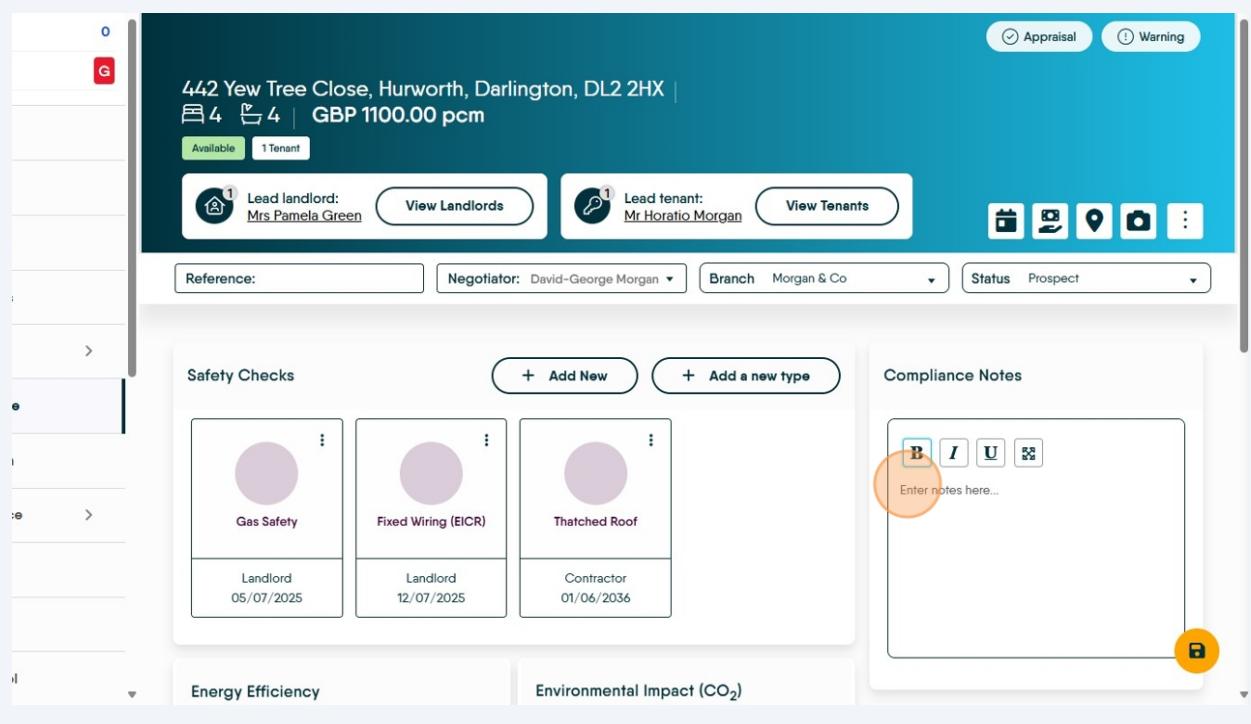
Gas Safety	Fixed Wiring (EICR)	Thatched Roof
Landlord 05/07/2025	Landlord 12/07/2025	Contractor 01/06/2036

Compliance Notes

B I U Enter notes here...

Energy Efficiency Environmental Impact (CO₂)

23 Click "Enter notes here..."



0

G

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

Appraisal Warning

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

Safety Checks + Add New + Add a new type

Gas Safety	Fixed Wiring (EICR)	Thatched Roof
Landlord 05/07/2025	Landlord 12/07/2025	Contractor 01/06/2036

Compliance Notes

B I U Enter notes here...

Energy Efficiency Environmental Impact (CO₂)