

# Adding New Compliance Check Types in CRM



This guide is essential for anyone looking to ensure compliance in their CRM system effectively. By following the straightforward steps outlined, users can easily add NEW bespoke compliance checks that are specific to properties you manage, for example Thatched Roof.

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.

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 property details for '442 Yew Tree Close, Hurworth, Darlington, DL2 2HX'. It shows '4' bedrooms and '4' bathrooms, with a price of 'GBP 1100.00 pcm'. The status is 'Available' and there is '1 Tenant'. Lead information is provided for the landlord, Mrs Pamela Green, and the tenant, Mr Horatio Morgan. Below this, there are fields for 'Reference', 'Negotiator' (David-George Morgan), 'Branch' (Morgan & Co), and 'Status' (Prospect). The 'Property Marketing' section includes a 'Currency' dropdown set to 'GBP' and five input fields: 'Rent (GBP)' (1,100.00), 'Deposit (GBP)' (0.00), 'Bedrooms' (4), 'Bathrooms' (4), and 'Receptions' (2).

## 2 Click "Compliance"

The screenshot shows a software interface for property management. On the left is a vertical 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 header with 'Appraisal' status, property address, and rental information (GBP 1100.00 pcm). Below this are sections for 'Lead landlord' (Mrs Pamela Green) and 'Lead tenant' (Mr Horatio Morgan), each with a 'View' button. A form below these sections contains fields for Reference, Negotiator (David-George Morgan), Branch (Morgan & Co), and Status (Prospect). The 'Property Marketing' section features five cards: Rent (GBP) at 1,100.00, Deposit (GBP) at 0.00, Bedrooms at 4, Bathrooms at 4, and Reception at 2. The 'Property Advertising' section is partially visible at the bottom.

## Adding a New Compliance Type

### 3 Click "Add a new type"

This screenshot shows the 'Compliance' section of the software. The left sidebar is partially visible. The main content area shows the same property details as the previous screenshot. Below the 'Property Marketing' section, there is a 'Safety Checks' section with two cards: 'Gas Safety' (Landlord 05/07/2024) and 'Fixed Wiring (EICR)' (Landlord 12/07/2025). Above these cards are two buttons: '+ Add New' and '+ Add a new type' (highlighted with an orange circle). To the right of the 'Safety Checks' section is a 'Compliance Notes' section with a text area and a 'Save' button (highlighted with an orange circle). The bottom of the screen shows 'Energy Efficiency' and 'Environmental Impact (CO2)' sections.

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

**Add New Safety Check** ×

Add a new reminder for a required safety check

Check name  
Enter check name

Gas	Wiring	Appliances	Oil
Smoke	Extinguisher	Fire	Carbon

Cancel Save

- 5 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

6 Click "Save" this is the new compliance created

The screenshot shows a modal window titled "Add New Safety Check" with 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 the value "Thatched Roof". Below this is a grid of eight checkboxes for different safety checks: Gas, Wiring, Appliances, Oil, Smoke, Extinguisher, Fire, and Carbon. The "Fire" checkbox is selected, indicated by a blue checkmark. At the bottom of the modal are two buttons: "Cancel" and "Save". The "Save" button is highlighted with an orange circle.

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

The screenshot shows the main interface of a property management system. The top header displays the property address "442 Yew Tree Close, Hurworth, Darlington, DL2 2HX" and the price "GBP 1100.00 pcm". Below this, there are buttons for "View Landlords" and "View Tenants". The "Lead landlord" is listed as "Mrs Pamela Green" and the "Lead tenant" is "Mr Horatio Morgan". The interface includes a sidebar on the left with various navigation options. The main content area is divided into sections: "Safety Checks" with a grid of two items, "Gas Safety" and "Fixed Wiring (EICR)", and "Compliance Notes" with a text input field. The "Add New" button in the "Safety Checks" section is highlighted with an orange circle.

- 8 Click the new compliance option.

The screenshot shows a web application interface with a modal dialog titled "Add New Safety Check". The dialog has a subtitle "Add a new reminder for a required safety check". It features two dropdown menus at the top: "Responsibility" with "Agent" selected and "Due Date" with "26/06/2025" selected. Below these are eight checkboxes arranged in a 2x4 grid. The checkboxes are labeled: "Thatchewd Roof", "Thatched Roof", "Gas Safety", "Fixed Wiring (EICR)", "Appliances", "Oil Service", "Smoke Alarms", and "Extinguishers". The "Thatched Roof" checkbox is selected and highlighted with an orange circle. At the bottom of the dialog are "Cancel" and "Save" buttons.

Responsibility		Due Date	
Agent		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"/>

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

The screenshot shows the same "Add New Safety Check" dialog box. In this step, the "Responsibility" dropdown menu is highlighted with an orange circle. The "Thatched Roof" checkbox is now selected, indicated by a blue checkmark inside the box. The "Due Date" remains "26/06/2025". The "Cancel" and "Save" buttons are at the bottom.

Responsibility		Due Date	
Agent		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"/>

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

Responsibility: Agent  
Due Date: 26/06/2025

Agent  
Landlord  
Contractor

		Gas Safety	Fixed Wiring (EICR)
Appliances	Oil Service	Smoke Alarms	Extinguishers

Cancel Save

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

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

Responsibility: Contractor  
Due Date: 26/06/2025

Thatched Roof	Thatched Roof	Gas Safety	Fixed Wiring (EICR)
Appliances	Oil Service	Smoke Alarms	Extinguishers

Cancel Save

## 11 Click "Save"

**Add New Safety Check** ×

Add a new reminder for a required safety check

Responsibility: Contractor

Due Date: 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