

# 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.

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

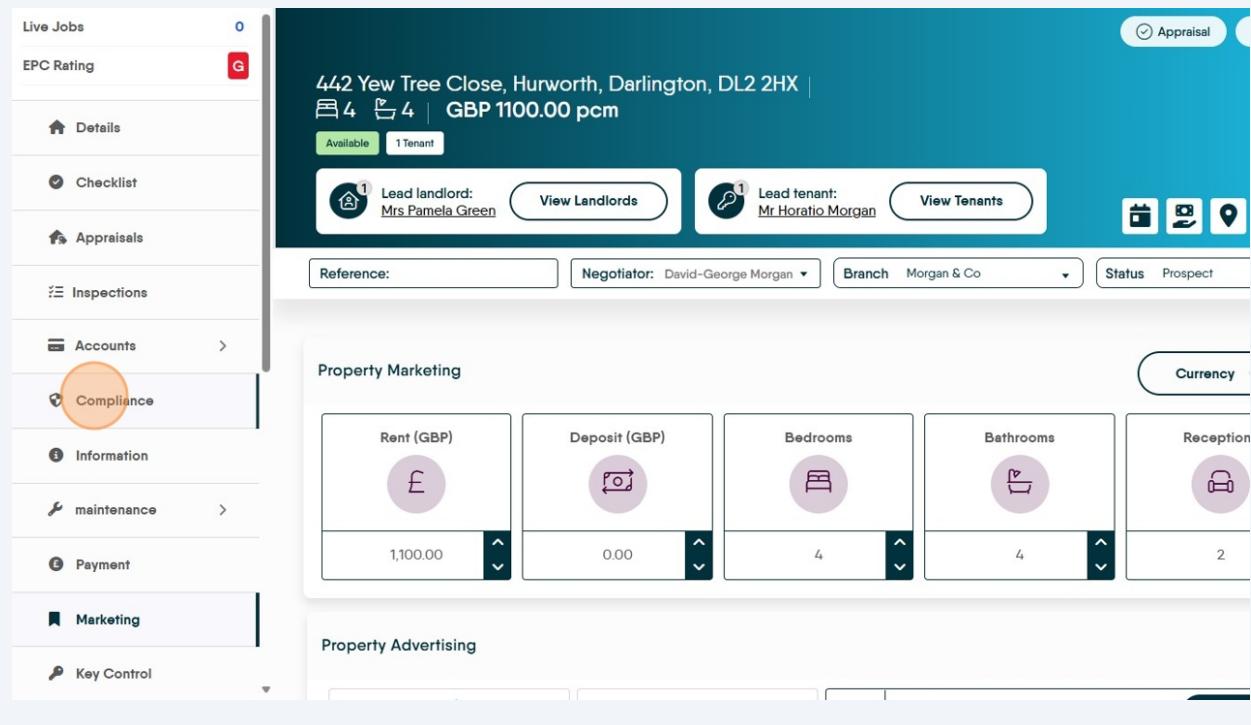
Lead landlord: Mrs Pamela Green View Landlords  
Lead tenant: Mr Horatio Morgan View Tenants

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

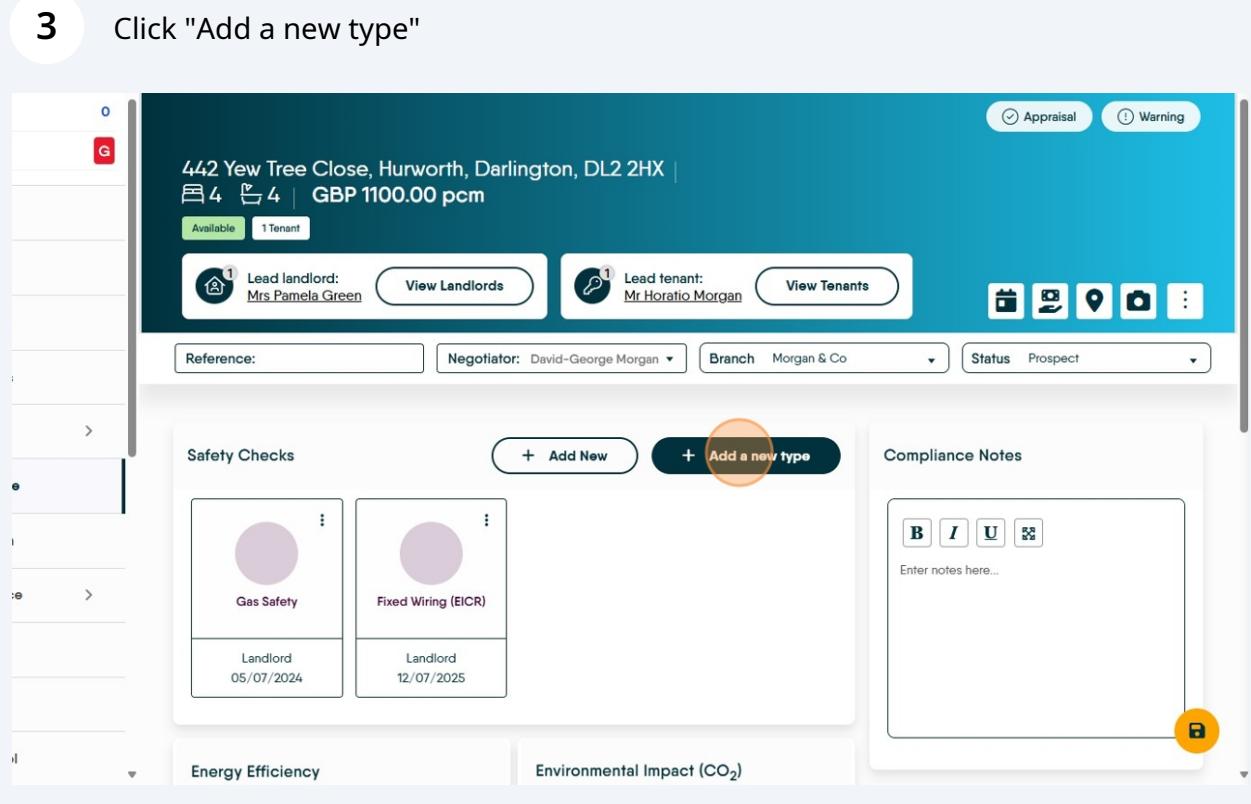
2 Click "Compliance"



The screenshot shows a software interface for managing properties. On the left, a sidebar lists various sections: Live Jobs, EPC Rating, Details, Checklist, Appraisals, Inspections, Accounts, Compliance (which is 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' with a price of 'GBP 1100.00 pcm'. It shows 4 bedrooms, 4 bathrooms, and 1 tenant. Below this, there are sections for 'Property Marketing' (with fields for Rent (GBP), Deposit (GBP), Bedrooms, Bathrooms, and Reception) and 'Property Advertising'. At the bottom, there are tabs for Energy Efficiency and Environmental Impact (CO<sub>2</sub>).

## Adding a New Compliance Type

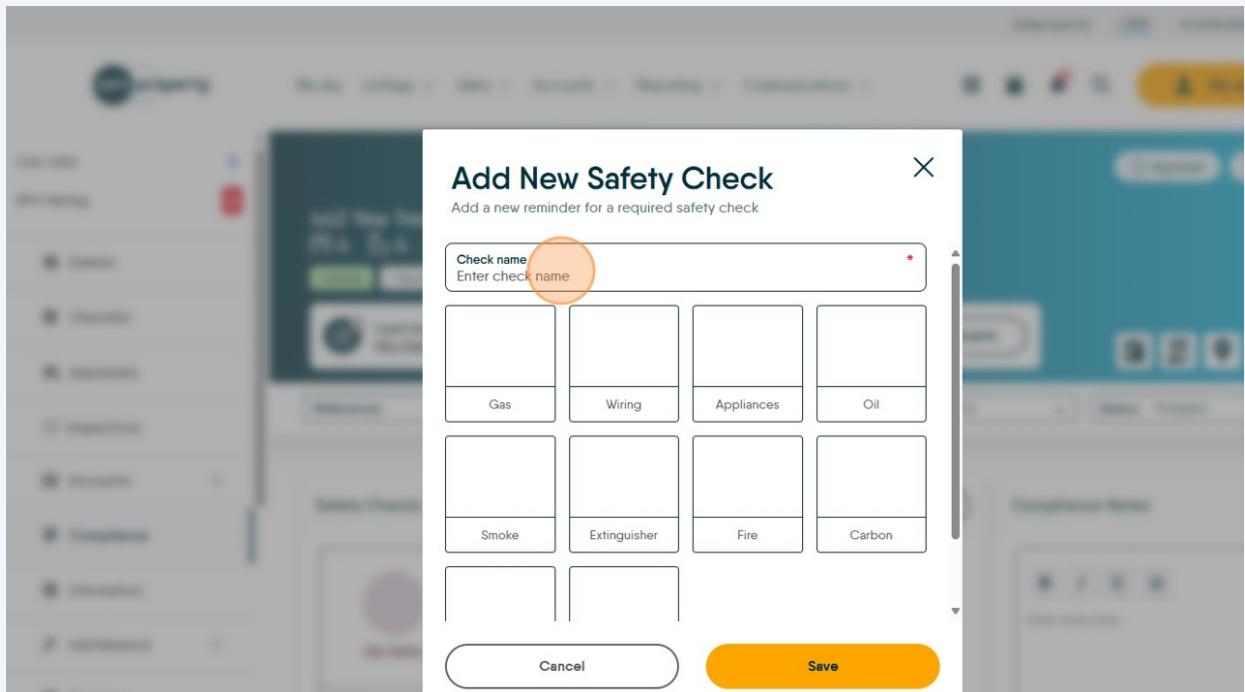
3 Click "Add a new type"



The screenshot shows the same software interface as the previous one, but with a focus on the 'Safety Checks' and 'Compliance Notes' sections. The 'Safety Checks' section shows two entries: 'Gas Safety' (Landlord, 05/07/2024) and 'Fixed Wiring (EICR)' (Landlord, 12/07/2025). Below this, there are tabs for 'Energy Efficiency' and 'Environmental Impact (CO<sub>2</sub>)'. The 'Compliance Notes' section has a text area with placeholder text 'Enter notes here...' and a 'Save' button at the bottom right. The 'Add a new type' button in the 'Safety Checks' section is highlighted with an orange circle.

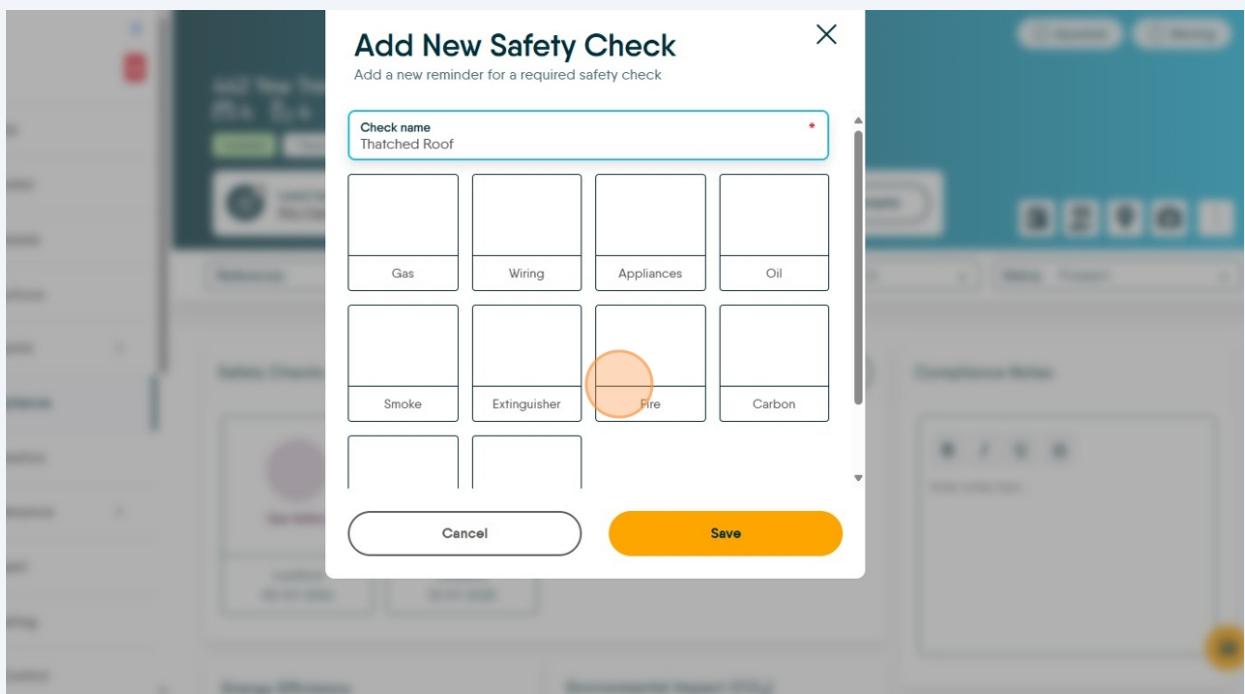
4

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

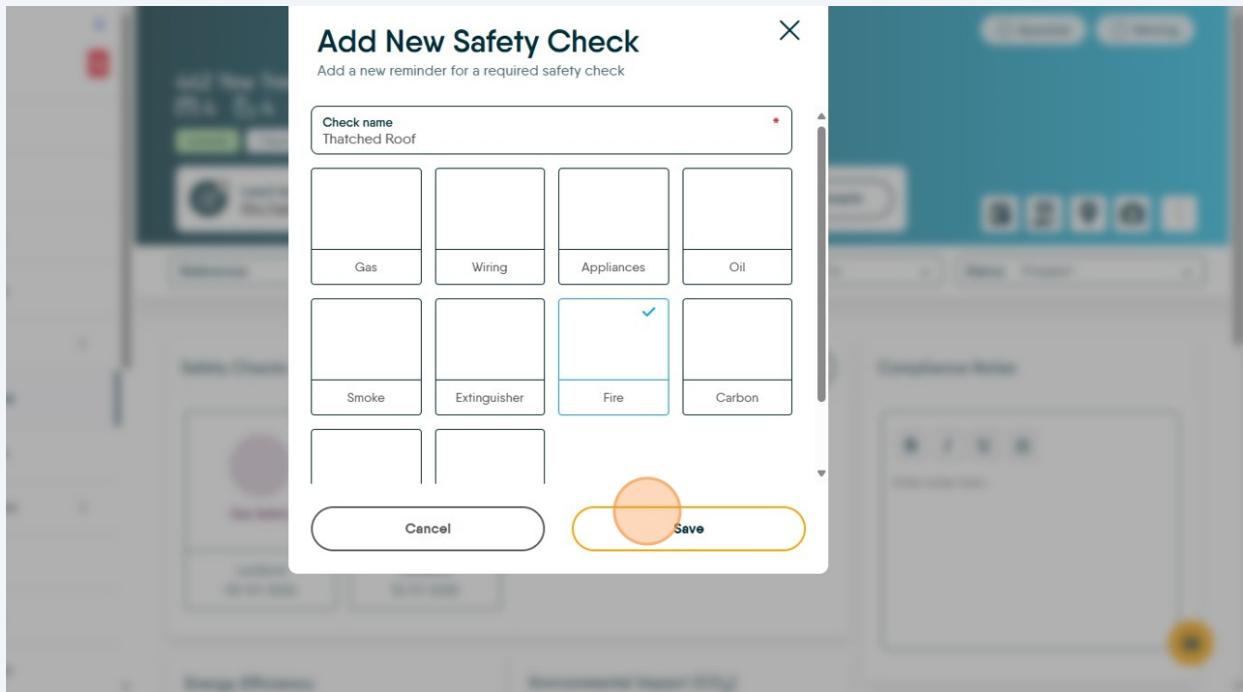


5

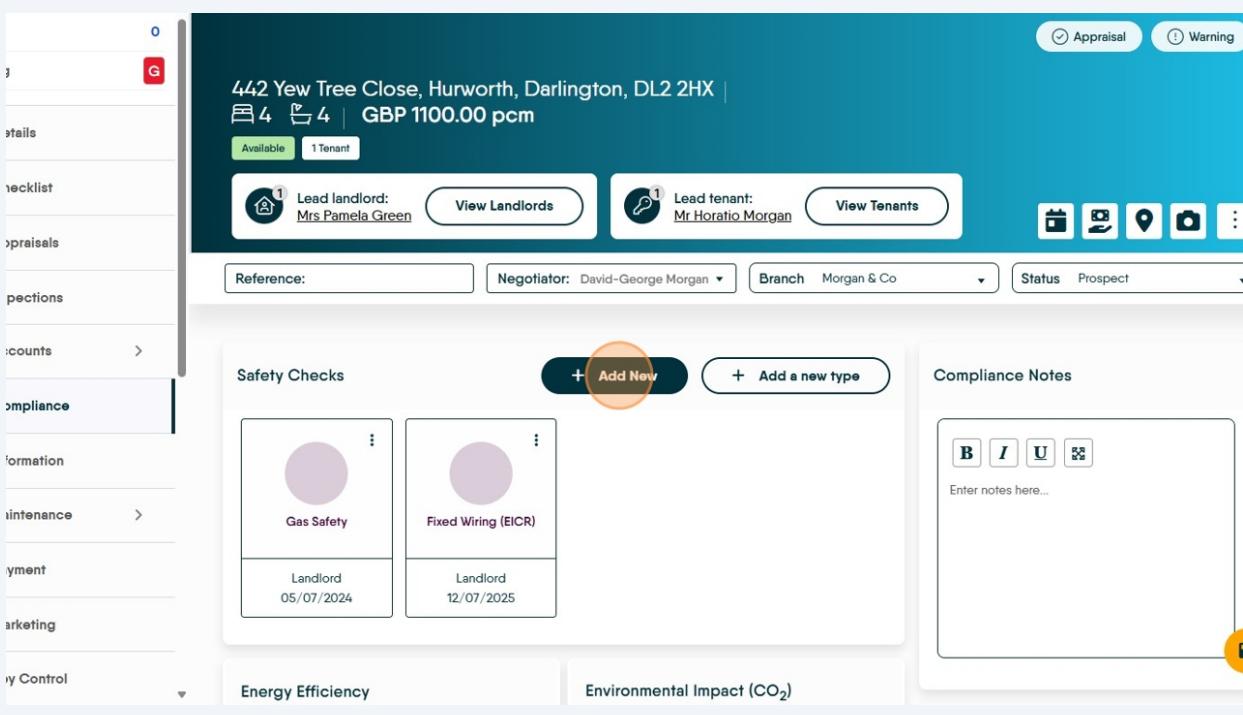
Select an icon to use.



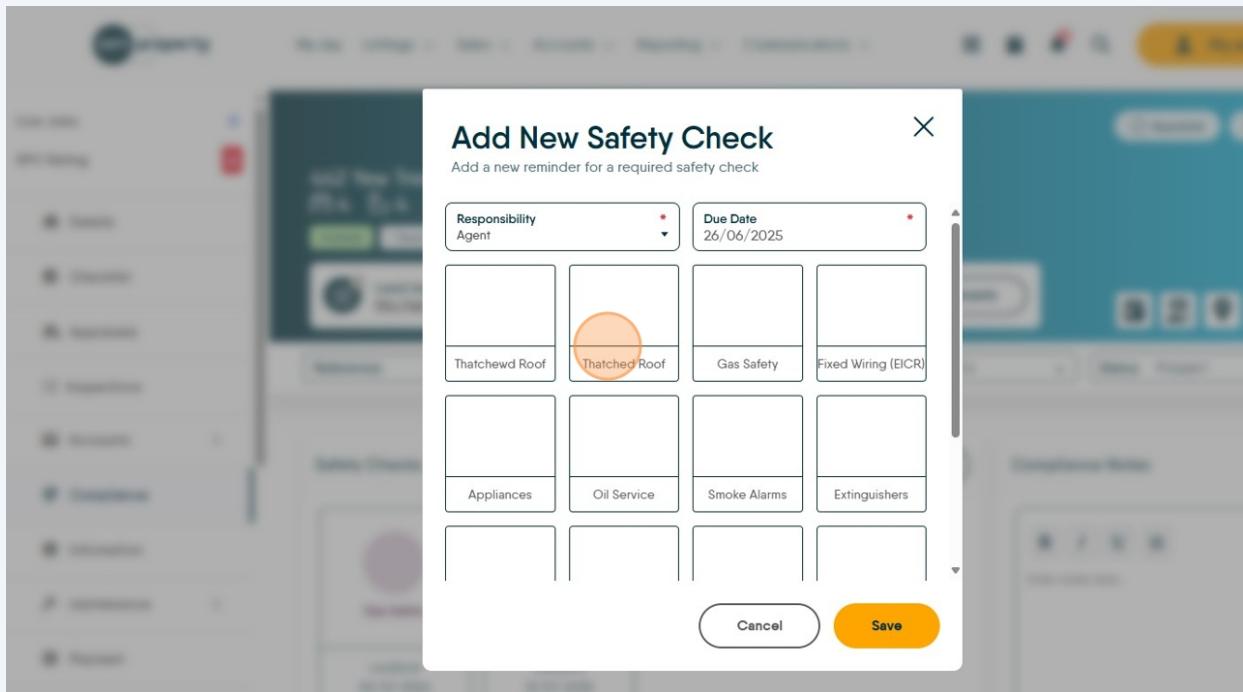
6 Click "Save" this is the new compliance created



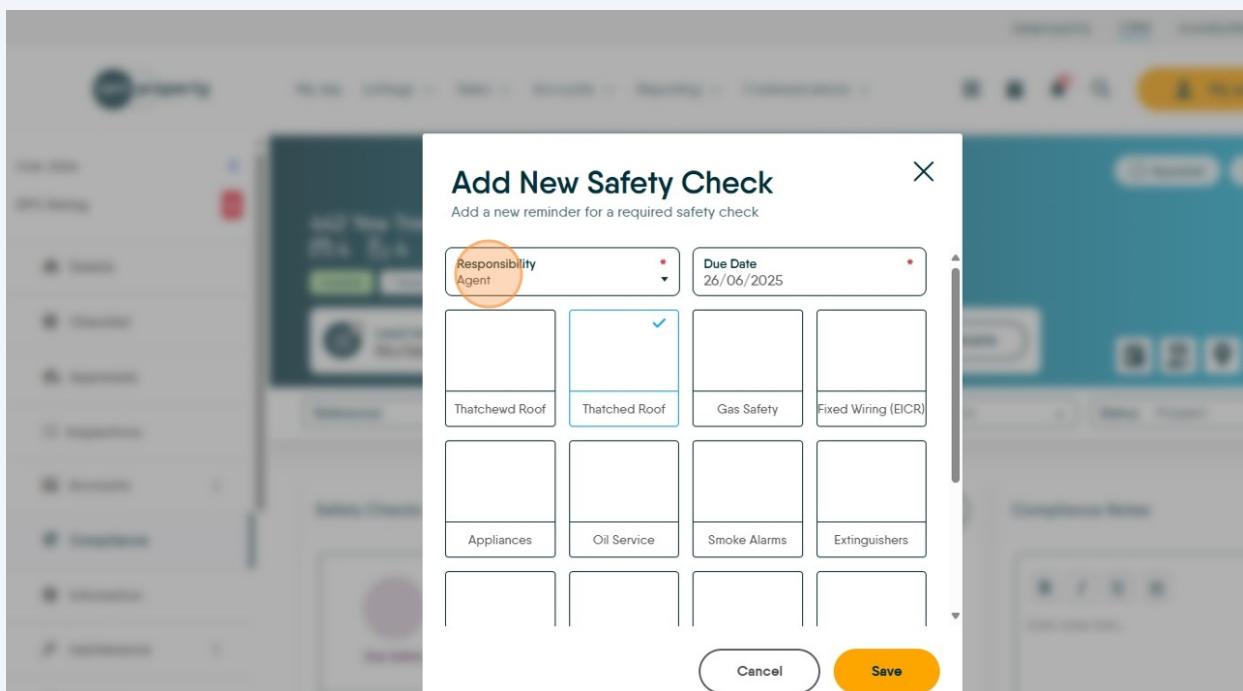
7 Click "Add New" to select and set the new compliance

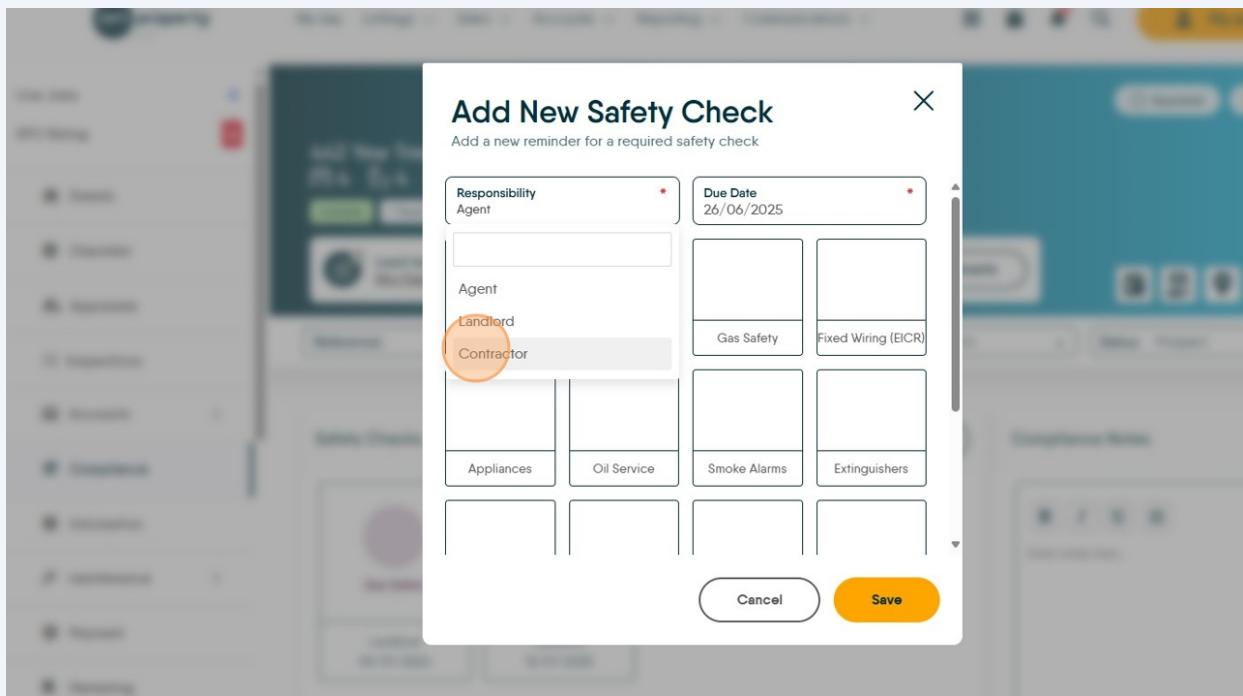


8 Click the new compliance option.

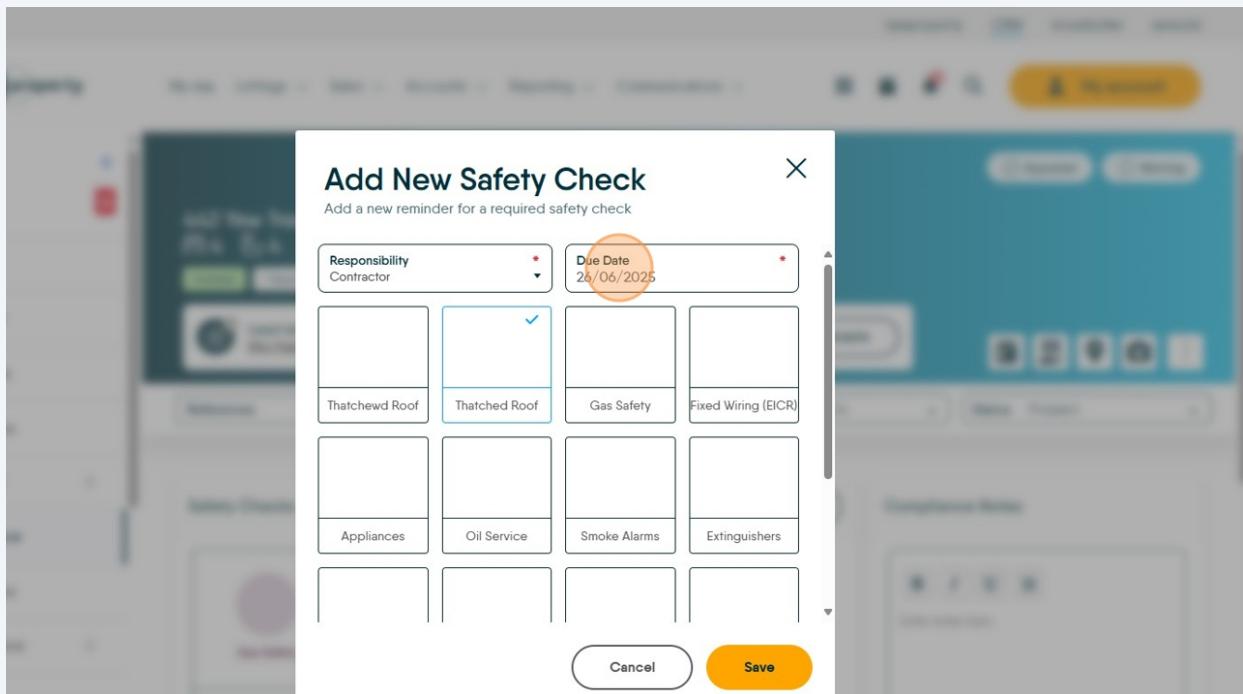


9 Click "Responsibility" to set who is responsible for the checks completion





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



11 Click "Save"

