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.

2 Click "Compliance"

Adding a New Compliance Type
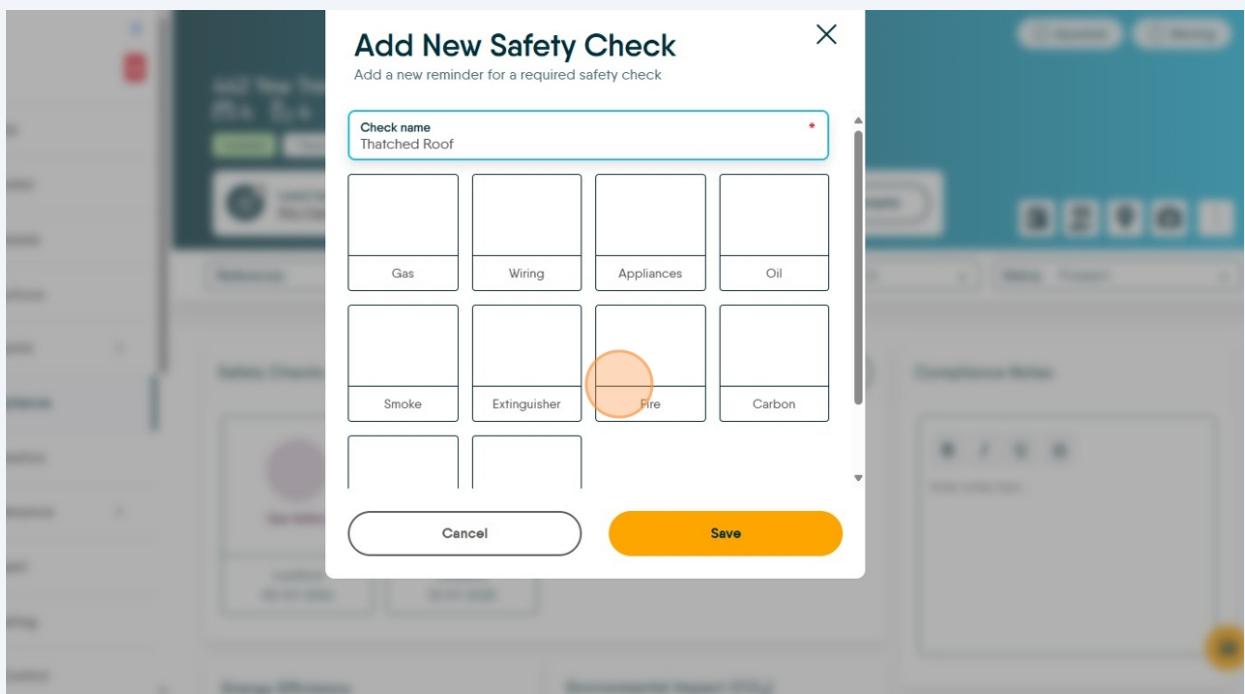
3 Click "Add a new type"
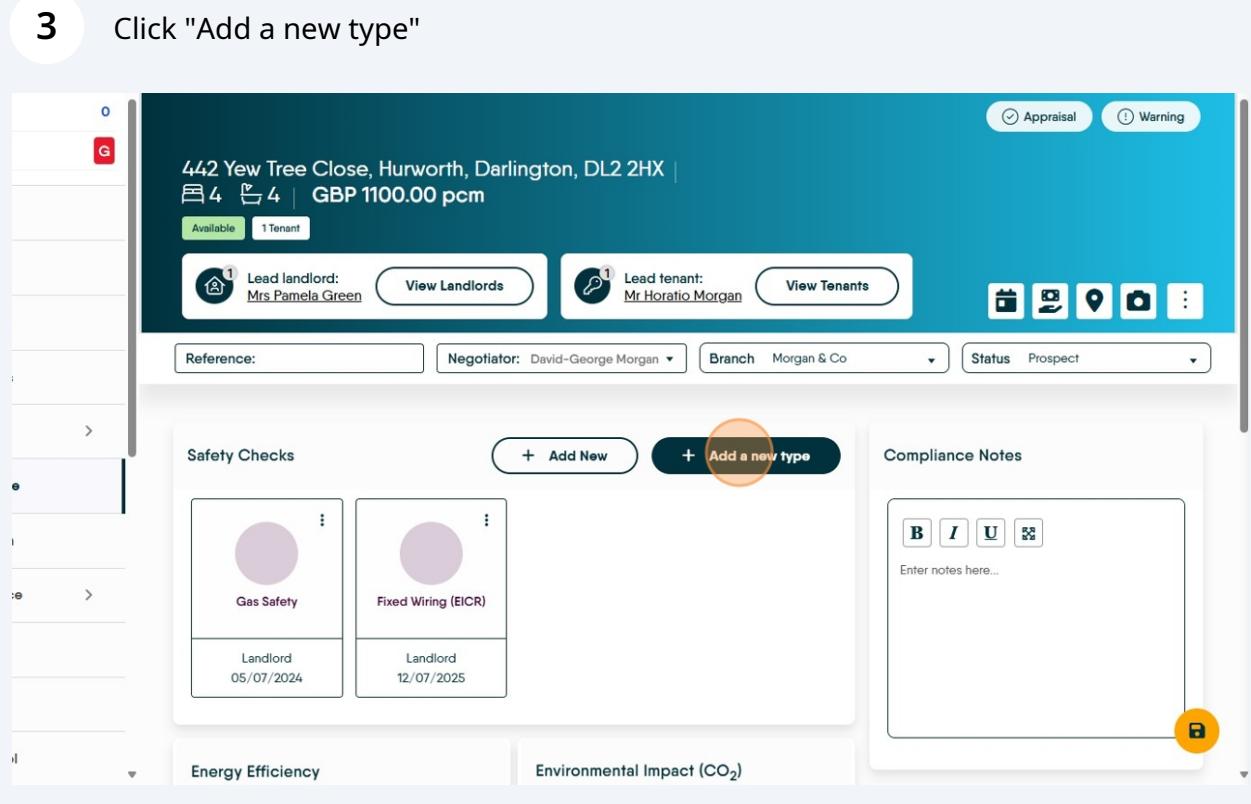
4   Click the "Enter check name" field. This is the name of your new compliance check.
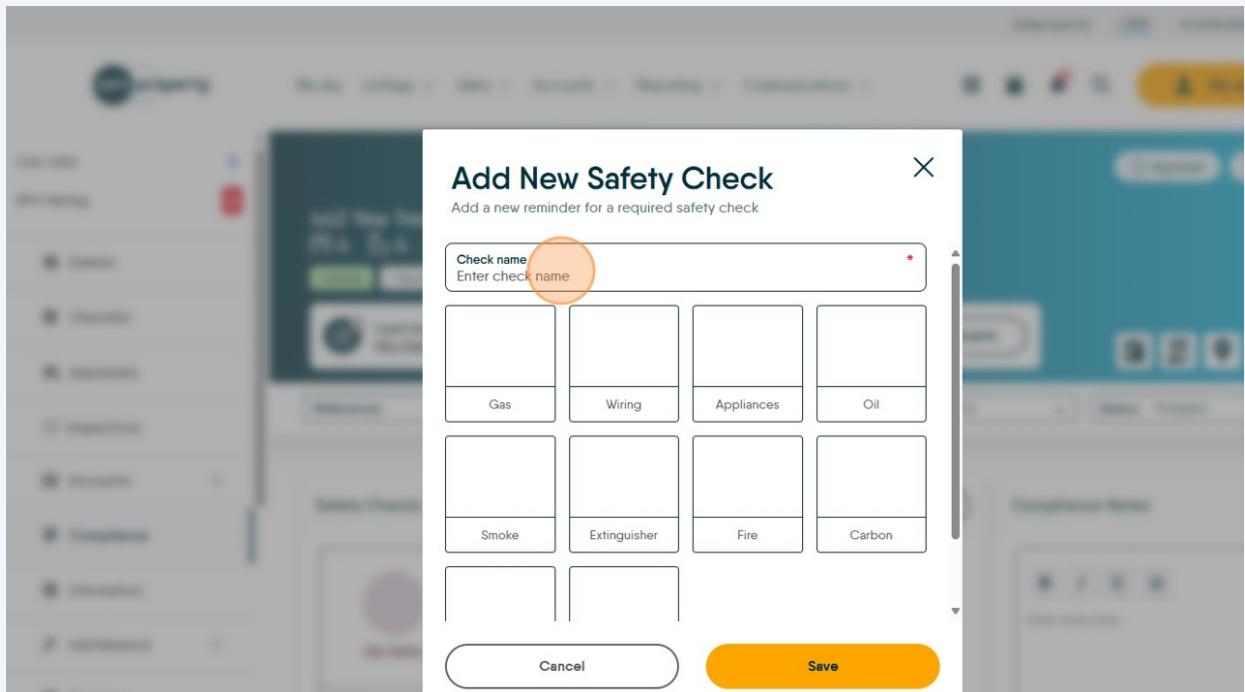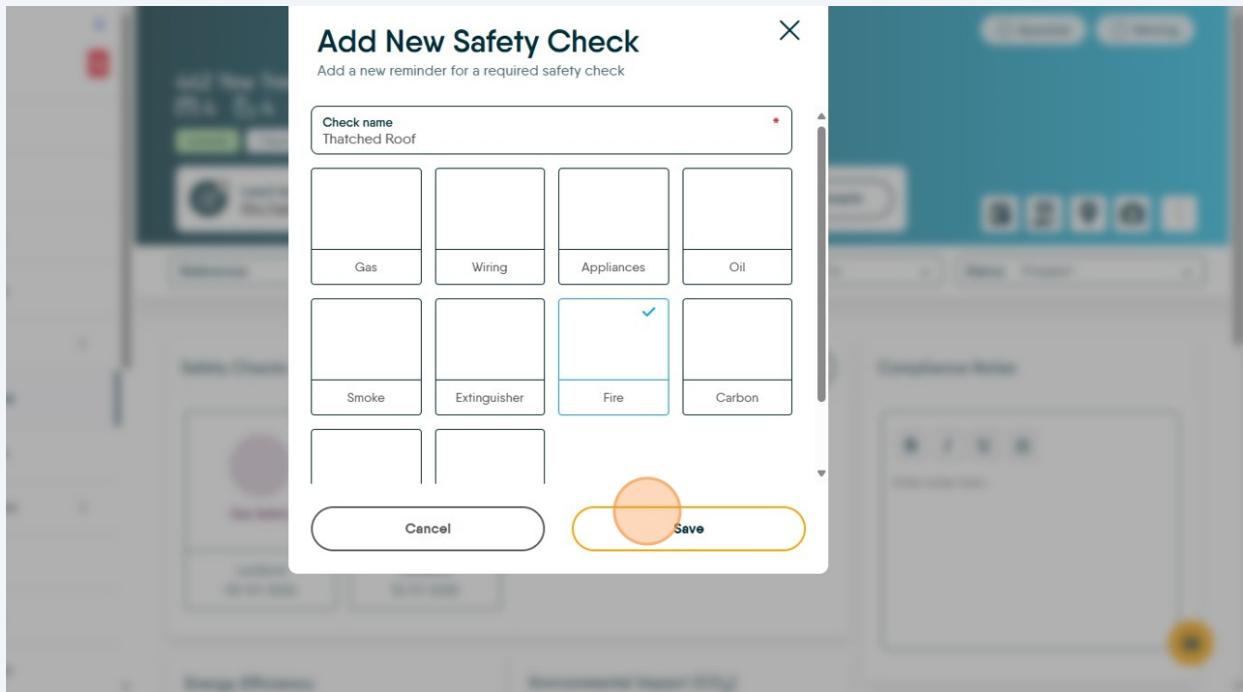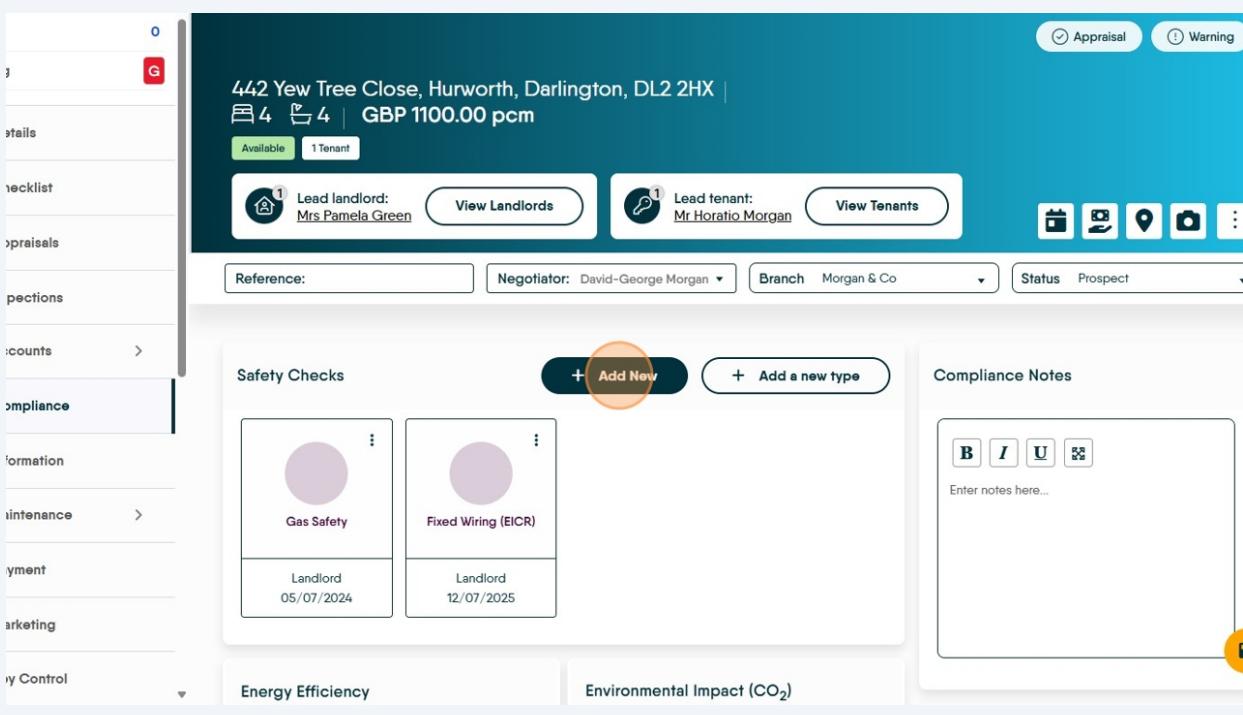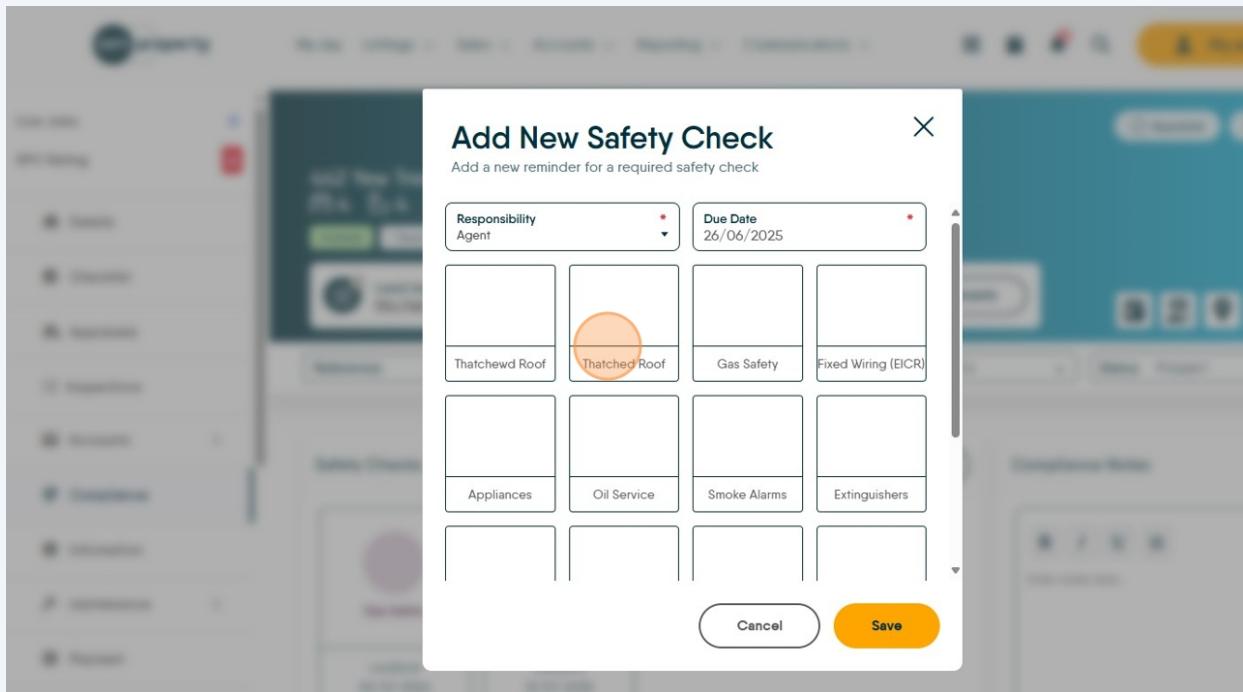

5   Select an icon to use.

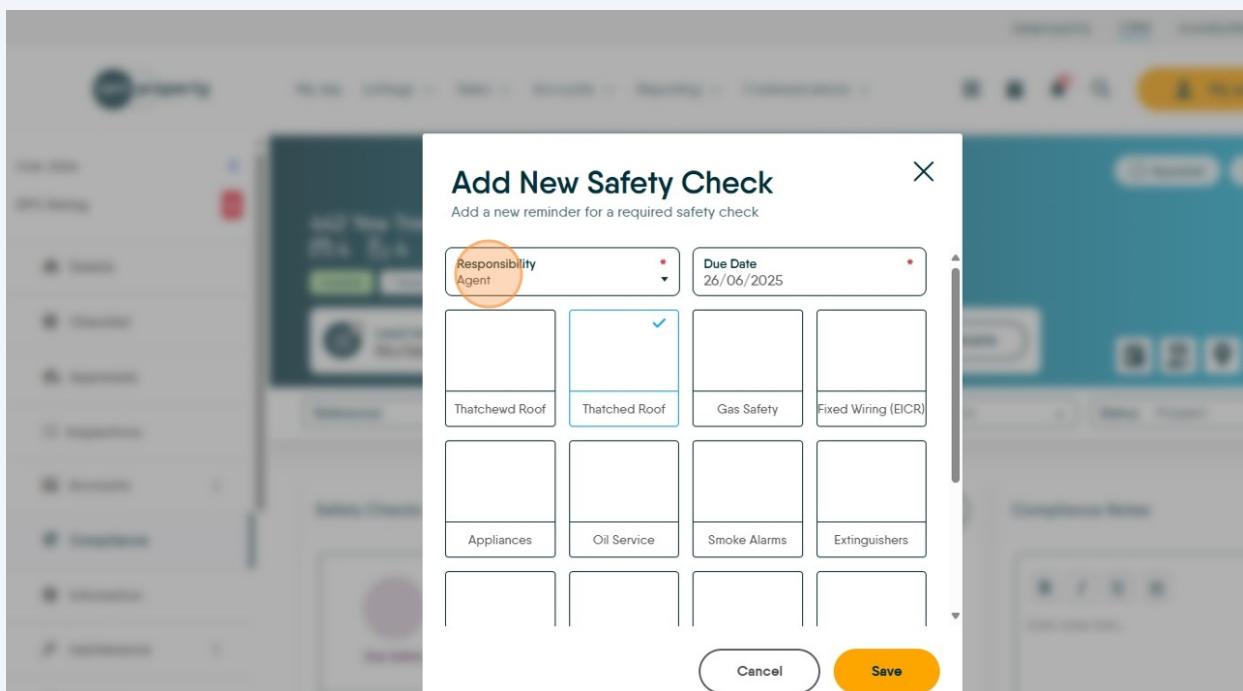**6**   Click "Save" this is the new compliance created

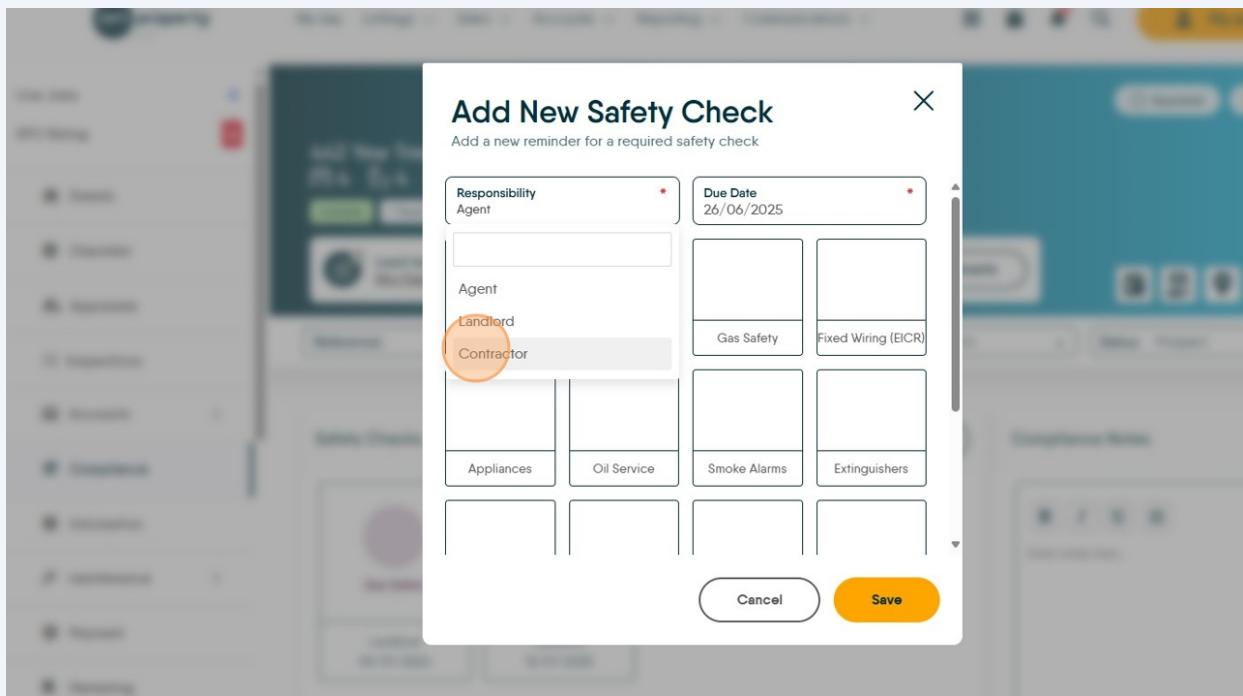**7**   Click "Add New" to select and set the new compliance

8   Click the new compliance option.
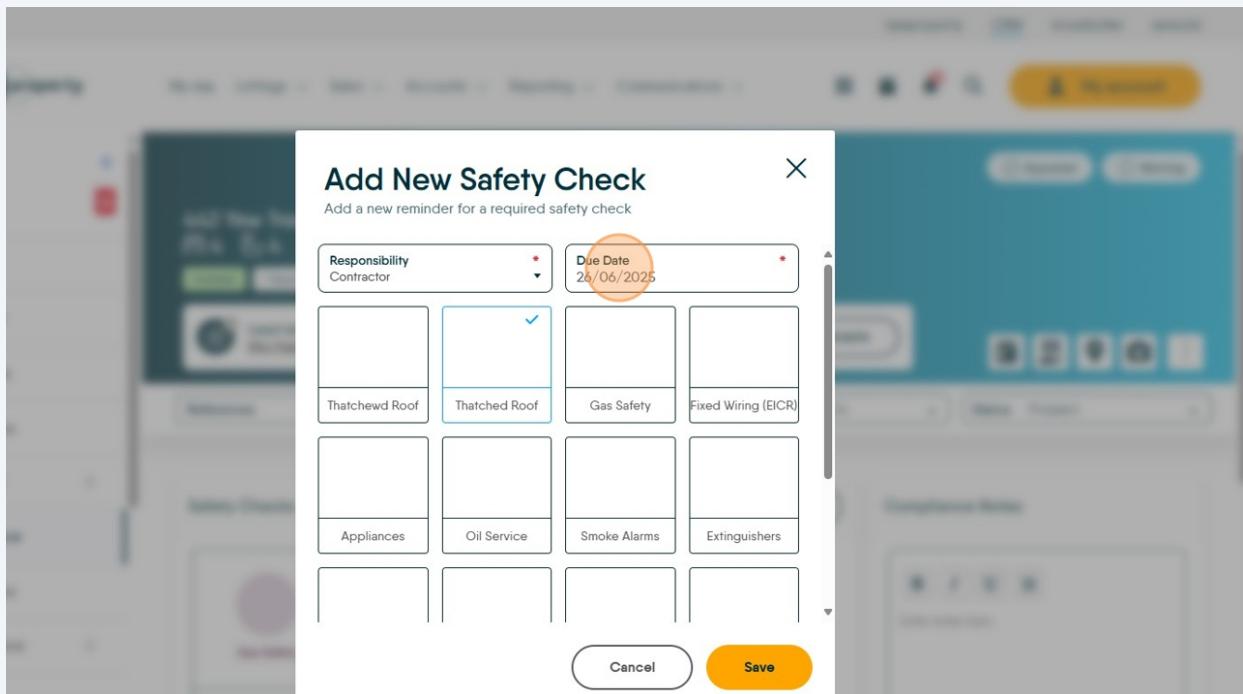

9   Click "Responsibility" to set who is responsible for the checks completion

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

11 Click "Save"