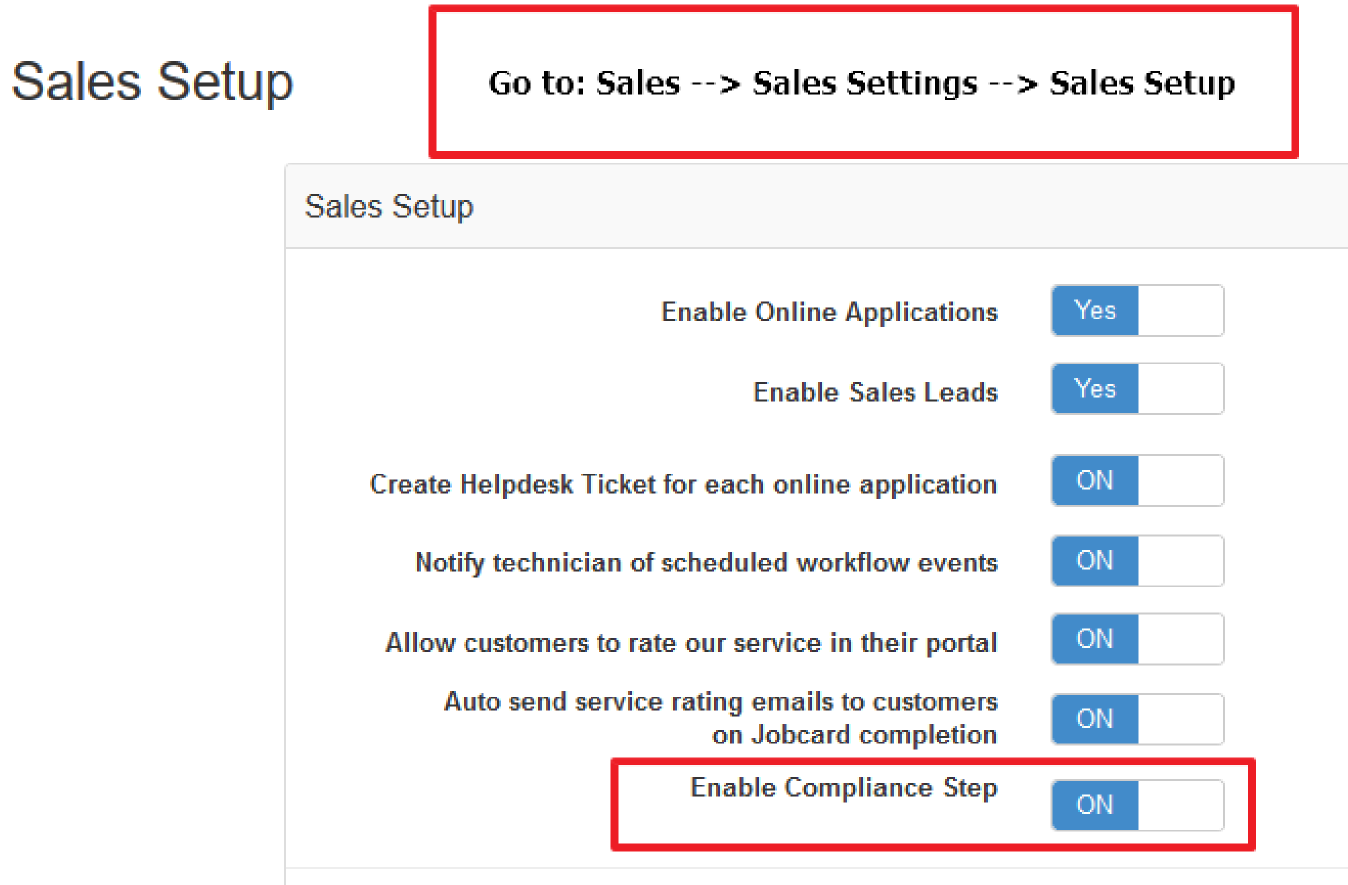
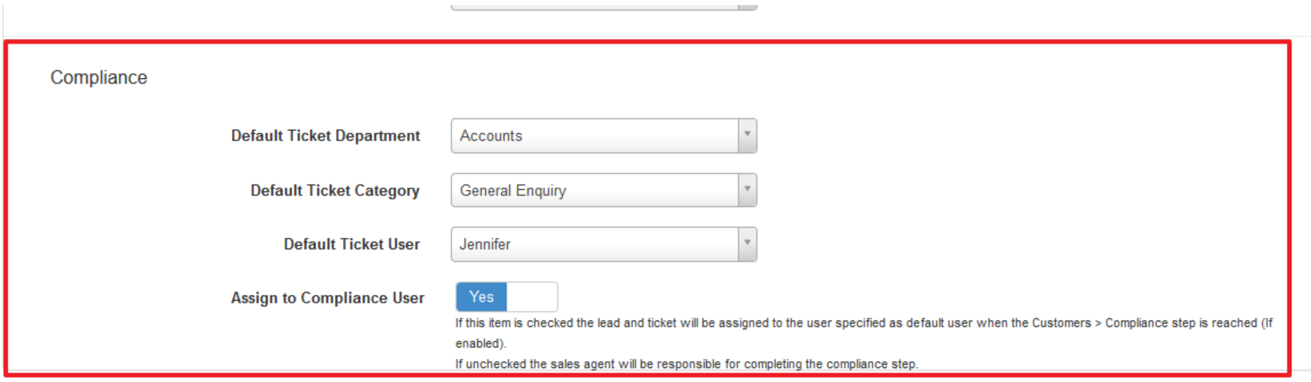
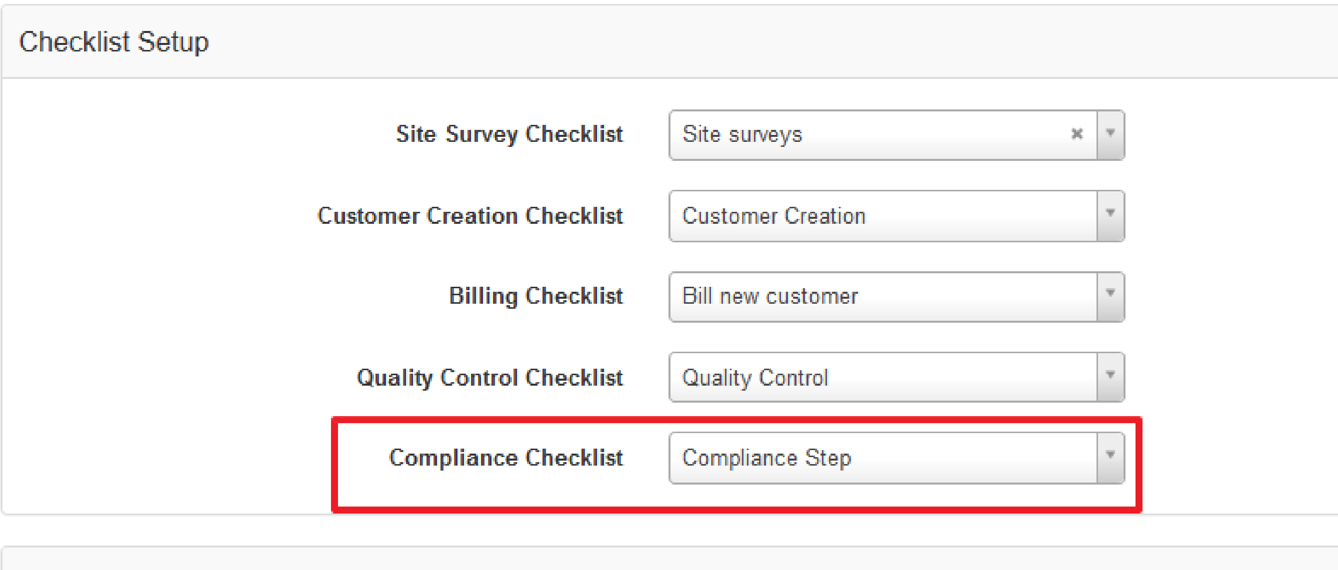
A compliance step and its settings will be released in version 1.21.16.

Note that this is only the first phase of the compliance phase that is being released and it is still in beta testing.

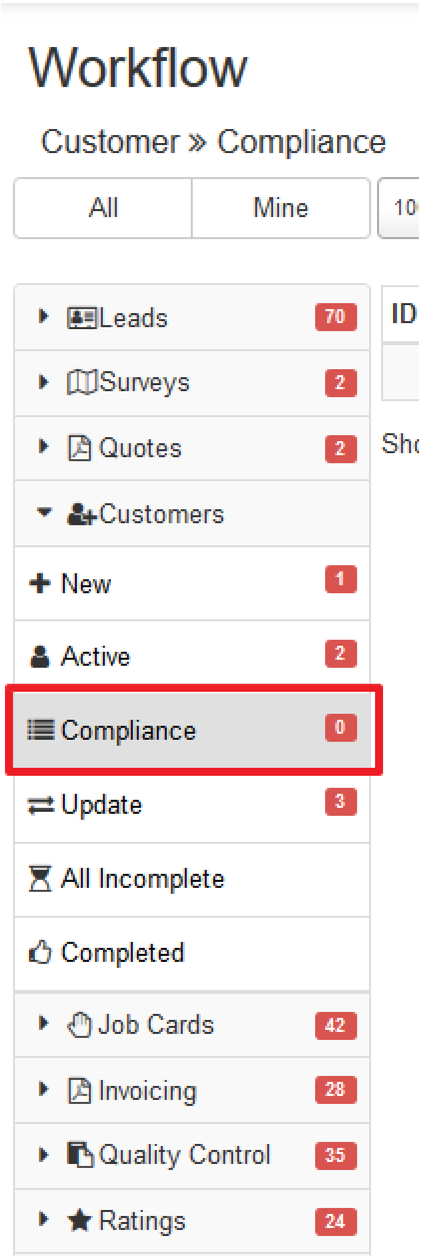
It is recommended to turn it on only after beta testing has been completed.



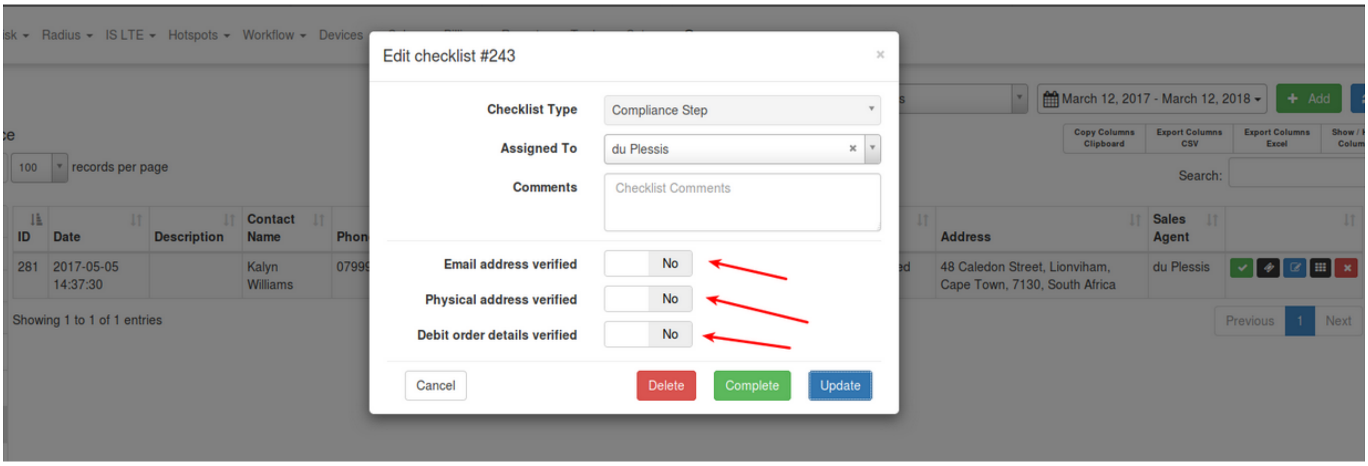




After compliance step has been enabled and set up in sales settings, it will appear in the sales workflow screen under Customers:



Editing a checklist in the compliance step:


Edit checklist #243
Checklist Type
Compliance Step
Assigned To
du Plessis
Comments
Checklist Comments
Email address verified
No
Physical address verified
No
Debit order details verified
No
Cancel
Delete
Complete
Update
Radius
IS LTE
Hotspots
Workflow
Devices
March 12, 2017 - March 12, 2018
Add
records per page
Search:
ID
Date
Description
Contact Name
Address
Sales Agent
281
2017-05-05 14:37:30
Kalyn Williams
48 Caledon Street, Lionviham, Cape Town, 7130, South Africa
du Plessis
Showing 1 to 1 of 1 entries
Previous
1
Next