

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.

Sales Setup

Go to: Sales --> Sales Settings --> Sales Setup

Sales Setup

Enable Online Applications	<input checked="" type="checkbox"/> Yes
Enable Sales Leads	<input checked="" type="checkbox"/> Yes
Create Helpdesk Ticket for each online application	<input checked="" type="checkbox"/> ON
Notify technician of scheduled workflow events	<input checked="" type="checkbox"/> ON
Allow customers to rate our service in their portal	<input checked="" type="checkbox"/> ON
Auto send service rating emails to customers on Jobcard completion	<input checked="" type="checkbox"/> ON
Enable Compliance Step	<input checked="" type="checkbox"/> ON

Compliance

Default Ticket Department

Accounts

Default Ticket Category

General Enquiry

Default Ticket User

Jennifer

Assign to Compliance User

☒ Yes

If this item is checked the lead and ticket will be assigned to the user specified as default user when the Customers > Compliance step is reached (if enabled).

If unchecked the sales agent will be responsible for completing the compliance step.

Checklist Setup

Site Survey Checklist

Site surveys

Customer Creation Checklist

Customer Creation

Billing Checklist

Bill new customer

Quality Control Checklist

Quality Control

Compliance Checklist

Compliance Step

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

Workflow

Customer » Compliance

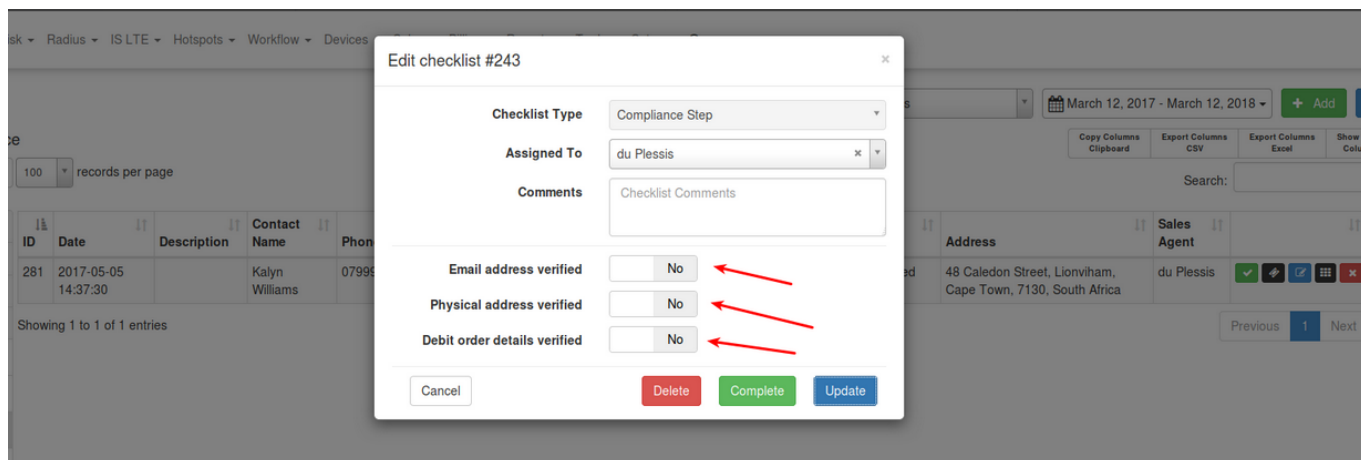
All

Mine

10

▶ Leads	70	ID
▶ Surveys	2	
▶ Quotes	2	Sho
▼ Customers		
+ New	1	
Active	2	
Compliance	0	
Update	3	
All Incomplete		
Completed		
▶ Job Cards	42	
▶ Invoicing	28	
▶ Quality Control	35	
▶ Ratings	24	

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

ID	Date	Description	Contact Name	Phone
281	2017-05-05 14:37:30		Kalyn Williams	07995

Showing 1 to 1 of 1 entries

Address	Sales Agent
48 Caledon Street, Lionviham, Cape Town, 7130, South Africa	du Plessis

Previous 1 Next