

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

Compliance

Default Ticket Department

Default Ticket Category

Default Ticket User

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	<input type="text" value="Site surveys"/>
Customer Creation Checklist	<input type="text" value="Customer Creation"/>
Billing Checklist	<input type="text" value="Bill new customer"/>
Quality Control Checklist	<input type="text" value="Quality Control"/>
Compliance Checklist	<input type="text" value="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:

