

Getting Started: Accounts, Roles & Plans

For: workspace administrators & executives • auditandcomply.com • July 2026

Who this guide is for: the person who sets up the company account, invites the team, and chooses the plan — usually an **Administrator**. Executives will also find the role matrix and plan overview useful.

1. One account, both sides of compliance

Every company on Audit and Comply is a single workspace that can do two things at once: **respond** to the compliance assessments your customers send you, and **assess** your own vendors and service providers. You never need a second login — what your company can do is determined by your plan and each user's role, not by which "side" you signed up on.

If an underwriting manager assesses you and you also assess your own IT providers, both happen in this one workspace, with one team, one document library, and one audit trail.

2. Registering your company

Go to `app.auditandcomply.com/register`. Enter your company name, your own name and email, and a password. You become the workspace's first **Administrator** and land on an empty dashboard in a brand-new, fully isolated tenant — no other company can ever see your data, and vice versa.

Invited instead? If a customer added you as their vendor contact, you'll receive an invitation email with a secure link. Setting your password through that link creates your account and connects it to the assessing company — you can still register your own company workspace around it later; everything appears together.

3. Roles: who can do what

Invite your team from the **Team** page. Each member gets exactly one role:

Role	What they can do	Typical person
Administrator	Everything: team management, billing, webhooks, plus all compliance-manager abilities.	Owner / operations lead
Compliance manager	Register vendors, issue assessments, review submissions, decide outcomes, manage findings, run the Company Vault and readiness programmes.	Compliance officer
Reviewer	Verify evidence, record verdicts, raise clarification threads on submitted assessments. Cannot decide final outcomes.	Risk analyst
Executive	Read-only visibility of dashboards, vendors and reports.	Director / CFO
Contributor	Helps answer the assessments your company receives. Cannot submit them and cannot manage your own compliance programme — that needs a manager role or being the lead contact.	Subject-matter helper

Audit and Comply
VENDOR COMPLIANCE

Dashboard
Assessments
Vendors
Compliance
Vault
Readiness
Standards
Network
Team
Billing
Notifications ☐

Team

Your organisation's internal users. Vendors are managed from their own records; this page is for compliance staff. Remember: outcomes for high- and critical-tier vendors need a second compliance manager (four-eyes).

NAME	EMAIL	ROLE	STATUS
Executive Viewer	exec@compliportal.local	EXECUTIVE	ACTIVE Deactivate
Naledi Mokoena	cm2@compliportal.local	COMPLIANCE MANAGER	ACTIVE Deactivate
Pieter van Wyk	reviewer@compliportal.local	REVIEWER	ACTIVE Deactivate
System Administrator	admin@compliportal.local	ADMIN	ACTIVE Deactivate
Thandi Nkosi (you)	compliance@compliportal.local	COMPLIANCE MANAGER	ACTIVE

Invite a colleague

Name *
Email *

Role

compliance manager

Compliance managers can finalise outcomes and approve risk acceptances. Reviewers verify evidence and raise findings. Executives get read-only dashboards.

[Send invitation](#)

Thandi Nkosi
COMPLIANCE MANAGER
[Sign out](#)

The Team page: invite colleagues by email and assign a role. Invitations arrive as secure links; seats are counted per plan.

Four-eyes is built in. Where your team has two or more people, sensitive sign-offs (policy approvals, high-risk assessment outcomes) require a second person. Solo teams record a self-approval instead — visibly, in the audit trail.

4. Plans at a glance

Plan	What it adds
Free	Respond to any assessment, document library, and the readiness <i>gap check</i> — a lite self-assessment with the full gap report.
Pro	Act on your own compliance: Company Vault, Policy Studio (10 AI drafts/month), readiness gap actions, standard packs shared with every assessor, network registry badge.
Premium	Assess your own vendors: 25 active vendors (extendable to 275), custom templates, AI template import, review workflow, recertification scheduling.
Enterprise	Unlimited vendors, chain-wide visibility, webhooks, uncapped AI drafts.

Audit and Comply

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Thandi Nkosi

COMPLIANCE MANAGER

Sign out

Billing & plan

PREMIUM

Your plan

Premium

Active vendors: 1 of 25

Plan limits are not being enforced yet (pre-launch mode).

Online payments are not configured yet. Contact support to change plans.

Your supplier identity

Your company's own supplier identity: **Audit and Comply Platform**. This is what other companies see when they assess you, and what network listings and chain-visibility grants below are based on.

Chain visibility

— let a company that assesses you see a badge-level roll-up of your own vendor book

Strictly pairwise and revocable: each company below sees only counts by status (plus vendor names if you allow it) — never scores, answers, findings or documents. Useful when your customers must oversee their whole supply chain.

No company currently assesses your supplier identity.

What each plan includes

PLAN	ACTIVE VENDORS	INCLUDES
Free	0	Respond to assessments, document library
Pro	0	+ Company Vault, readiness tools, standard-pack sharing, private registry, auto-prefill, analytics
Premium	25	+ Assess vendors, custom templates, AI template generation — +25-vendor packs available (max 10 → 275 vendors)
Enterprise	Unlimited	+ Chain visibility, webhooks

The Billing page shows your current plan, usage against limits, and upgrade options. Billing is in ZAR via Paystack.

5. Your first hour — a suggested path

- 1 **Invite the team** (Team page) — at minimum a second person, so four-eyes protections activate.
- 2 **Fill in the company profile** (Portal → Company profile) — five minutes; it powers AI policy generation and readiness guidance.
- 3 **Run a free gap check** (Readiness page) — pick a standard, self-assess honestly, and see where you stand.

4. **4 If you assess vendors:** register your first vendors (or import the book from CSV) and issue your first assessment — see Guide 2.
5. **5 If you're being assessed:** open the assessment from your portal and work through it section by section — see Guide 3.