# Audit and Comply

TRAINING GUIDE 1 OF 5

# 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

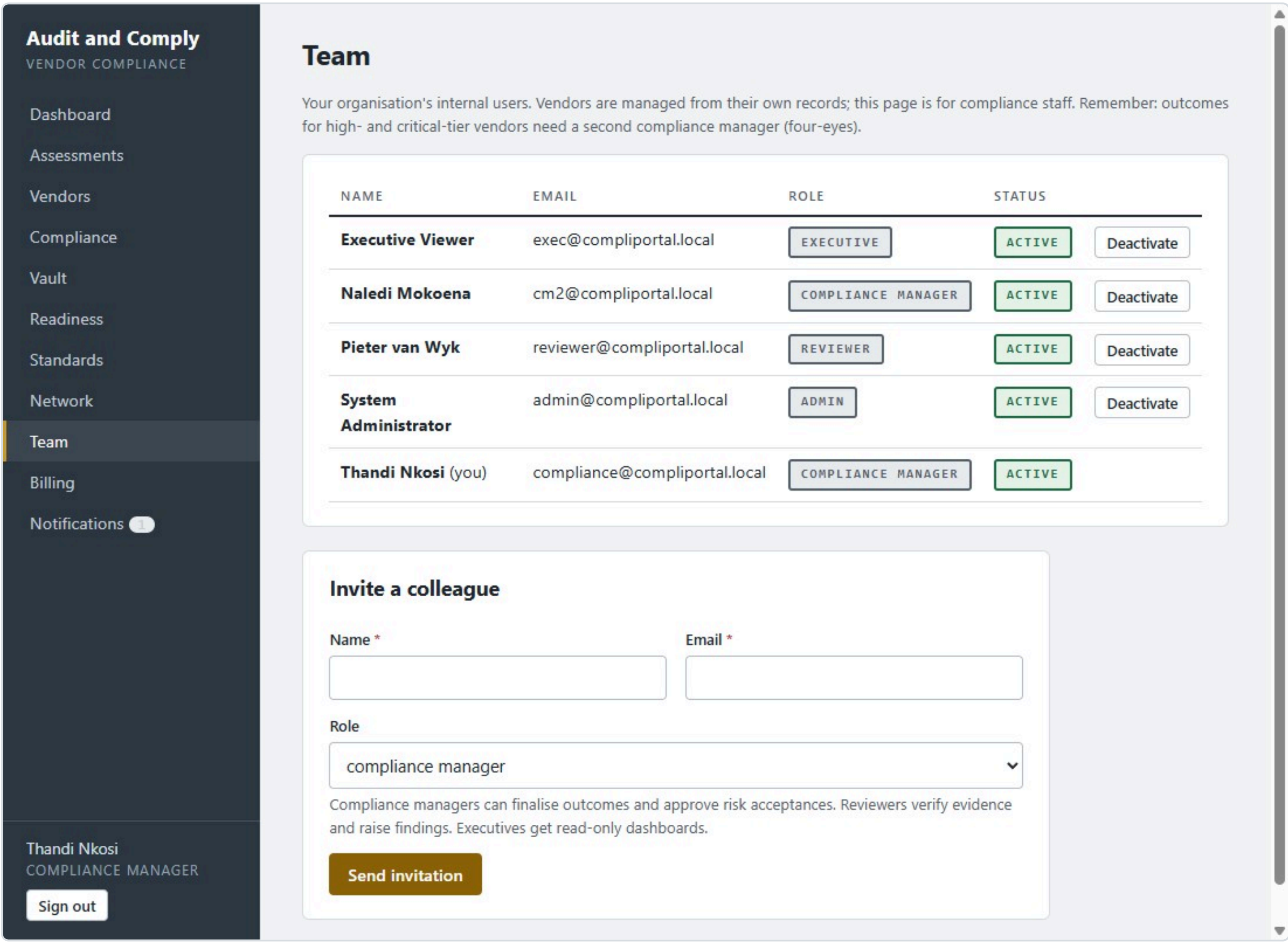
Go to `app.auditandcomply.com/register`. Enter your company name, your own name and email, and a password. You become the workspace's first **Administrator** and land on an empty dashboard in a brand-new, fully isolated tenant — no other company can ever see your data, and vice versa.

> **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 |

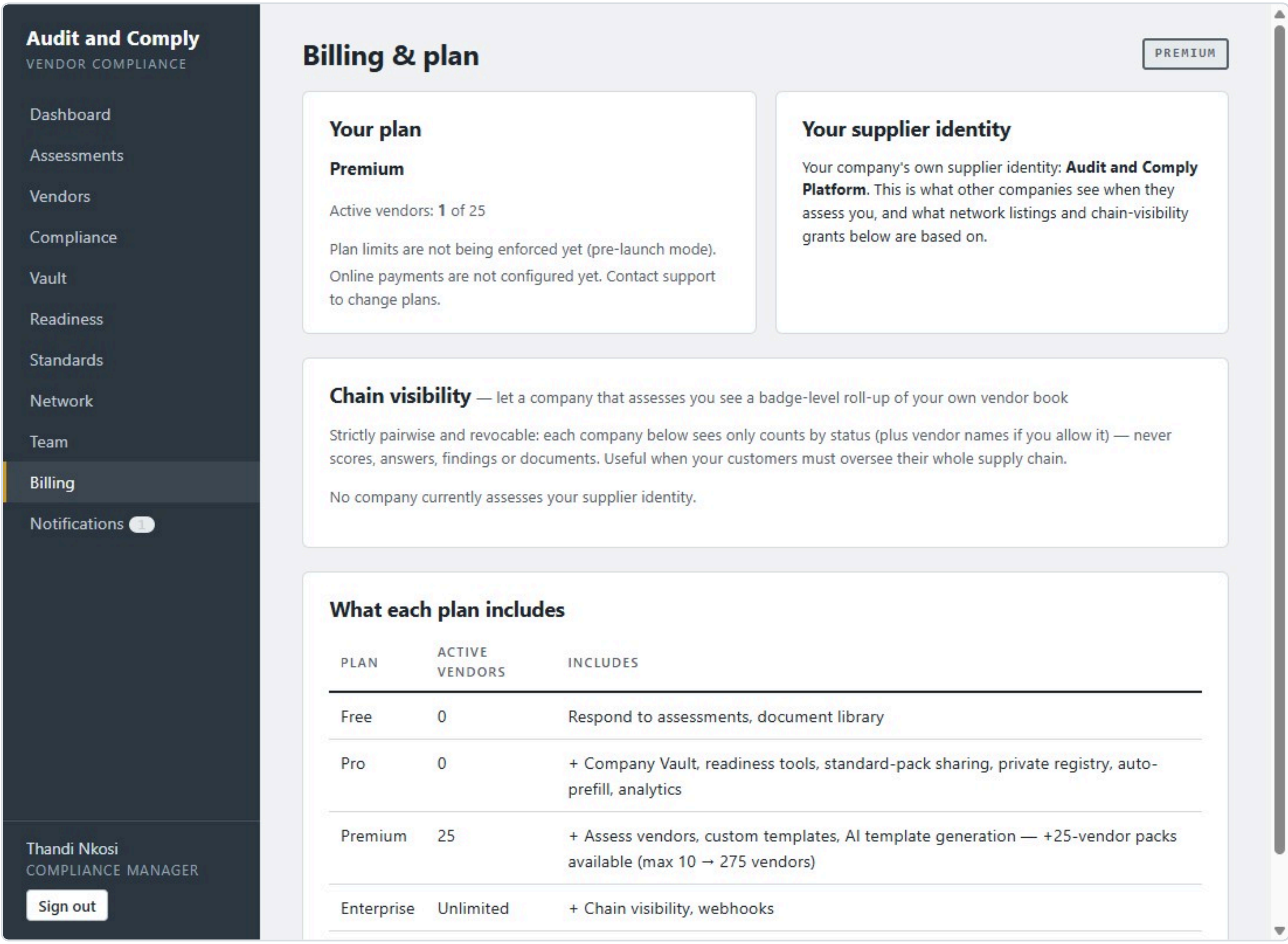



*The Team page: invite colleagues by email and assign a role. Invitations arrive as secure links; seats are counted per plan.*

> **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 *gap check* — 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. |




*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. ① **Invite the team** (Team page) — at minimum a second person, so four-eyes protections activate.
2. ② **Fill in the company profile** (Portal → Company profile) — five minutes; it powers AI policy generation and readiness guidance.
3. 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.

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