INTACT Platform

Target group: CB Admin

August 2025

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INTACT Platform Web

Intact Platform Web

Introduction

As a Certification Body (CB), you are expected to use the Intact Platform to manage key steps of the certification process. This includes:

- **Reviewing Auditee Information:** Access and review assigned auditees, including profile details, historical records, and uploaded documents.
  - The CBs will have access to all relevant data and documents from previous years for the auditees assigned to them. For producers, as part of the transition to certification and the use of Intact, the most recent licensing or SAV assessment report, along with other annually collected documents, will also be shared.
- **Reading Shared Memos:** View memos shared by Better Cotton regarding audit-related concerns such as identified risks, audit shadowing requests or feedback on submitted reports.
- **Notifying Better Cotton of Scheduled Audits:** Inform Better Cotton when an audit has been scheduled - in line with required timelines.
- **Submitting Audit Data and Documentation:** Upload and share all relevant audit data and supporting documents as per Better Cotton's requirements.
- **Updating Certification Status:** Provide updates on Corrective Action Plans (CAPs), certification decisions, and any changes to certification status (e.g., suspension, withdrawal).

Intact Platform Web
Glossary

- **CAB (Conformity Assessment Body)**
  - Also referred to as Certification Body (CB) by Better Cotton. CABs are responsible for carrying out audits and issuing certificates.
- **Auditee**
  - A Producer or Supply Chain Actor being audited or assessed for Better Cotton certification.
- **Entity**
  - A generic term used in Intact to refer to companies and persons, including their contact data, sites and the relationship between them
- **CAB Admin**
  - Also referred to as CB Admin. The main user at the CAB responsible for managing all activities in Intact (e.g. scheduling, uploading reports, handling findings, memos, issuing certificates, etc).
    - *Note: For the current year, all actions are performed by the CB Admin, not by individual auditors*
- **Memo**
  - A communication tool used within Intact to share notes, concerns, or instructions. These memos can be categorized and made available to different users in different areas of the software solution. CB Admins uses memos to flag issues or provide audit-related feedback.
- **Audit Order**
  - A digital record representing an individual audit event, including audit details, documents, reports, and findings.

Intact Platform Web

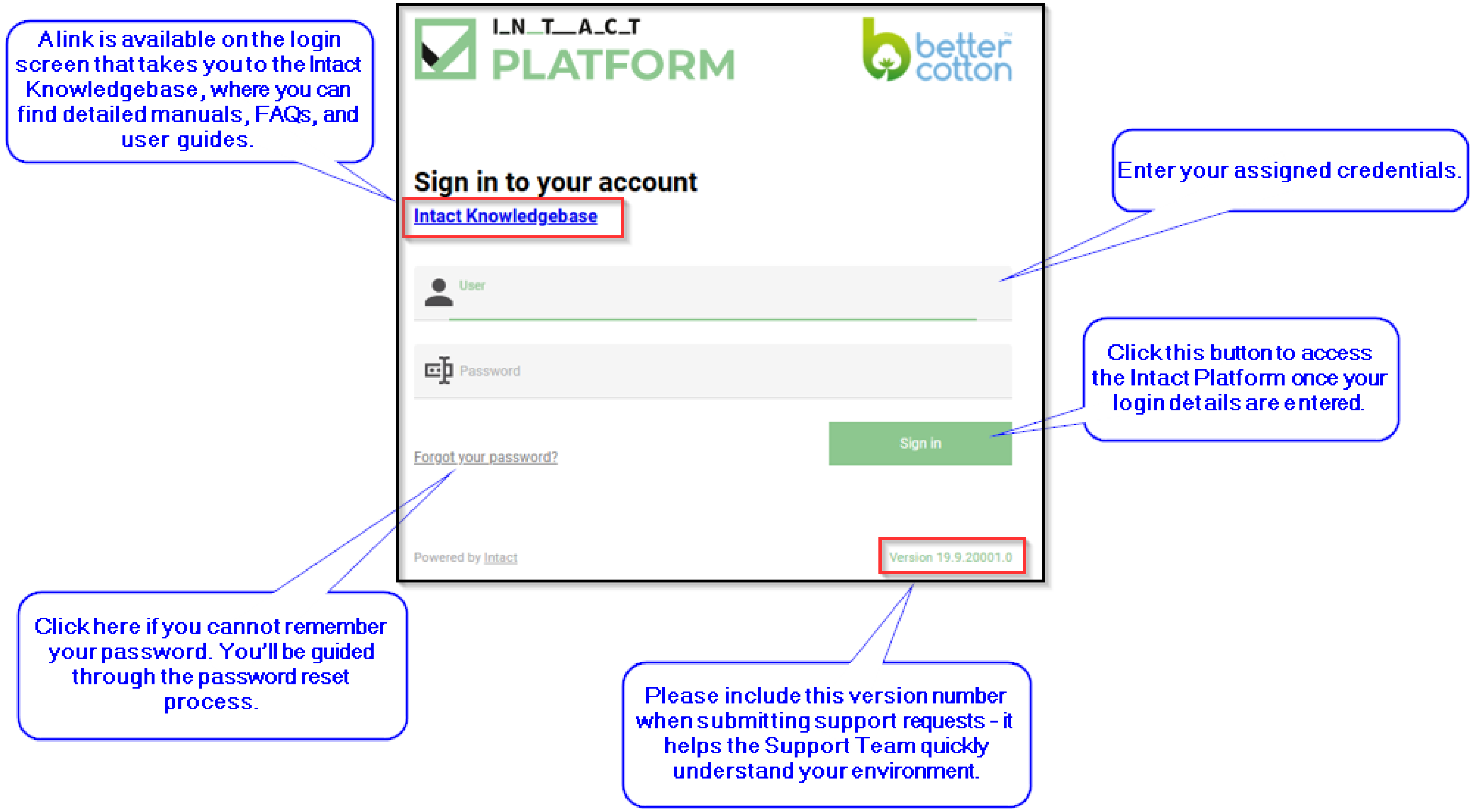
Loggin to the Intact Platform

This is the **login screen** for accessing the Intact Platform. Your starting point for managing certification activities.

Steps to Log In

- **Username & Password:** Enter your assigned credentials in the respective fields.
- **Sign In:** Click this button to access the Intact Platform once your login details are entered.

A CB can appoint more than 1 CB Admin to perform tasks in Intact.
A CB Admin must sign the training declaration before getting access to Intact.
For more information, contact compliance@bettercotton.org



Intact Platform Web
Reset your password

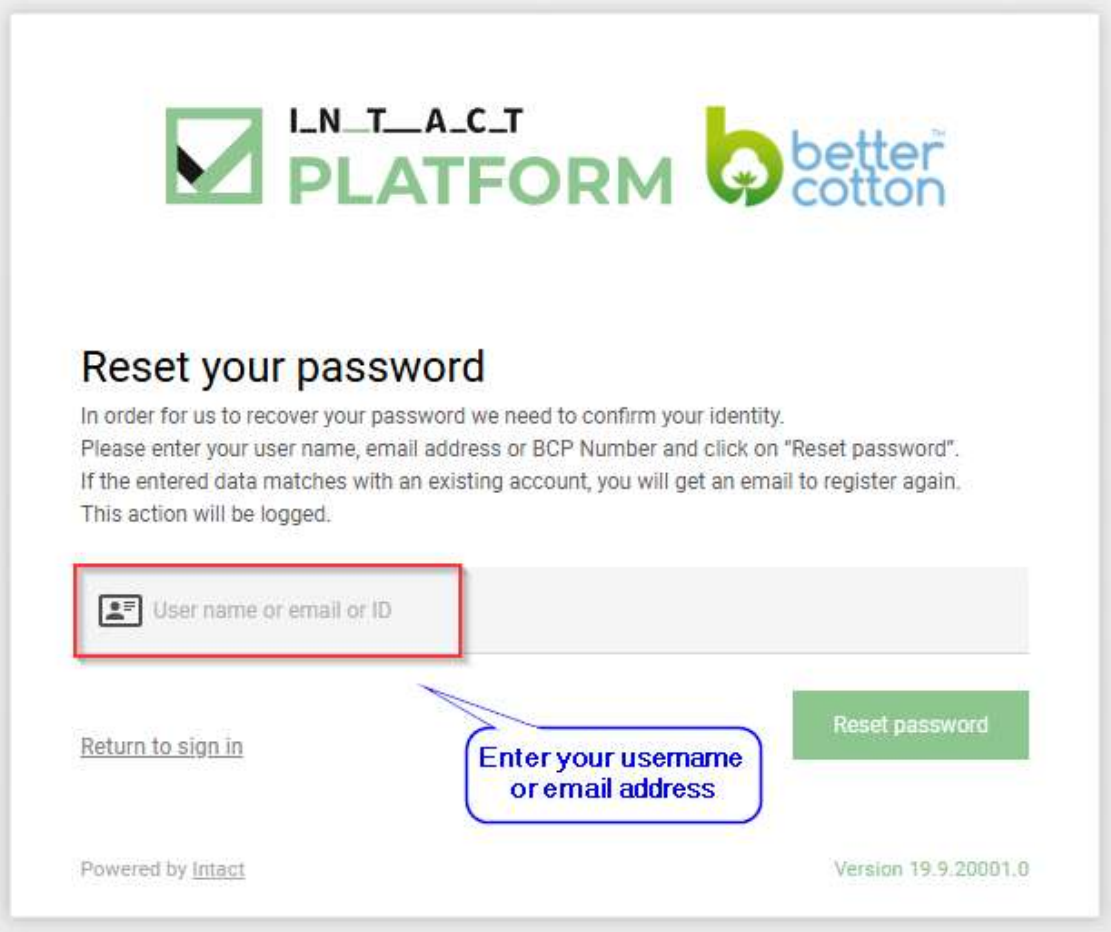
If you can't log in because you forgot your password, follow these steps to reset it securely.

Steps to reset your password

- On the Login Page, click the link: *Forgot your password?*
- You will be redirected to the Reset Password screen (see screenshot).
- Enter one of the following:
    - Your Username or you Email Address
- Click the Reset password button

If the entered data matches an existing user account, you'll receive an email with instructions to reset your password.

Note: If you do not receive an email, check your spam folder or contact compliance@bettercotton.org

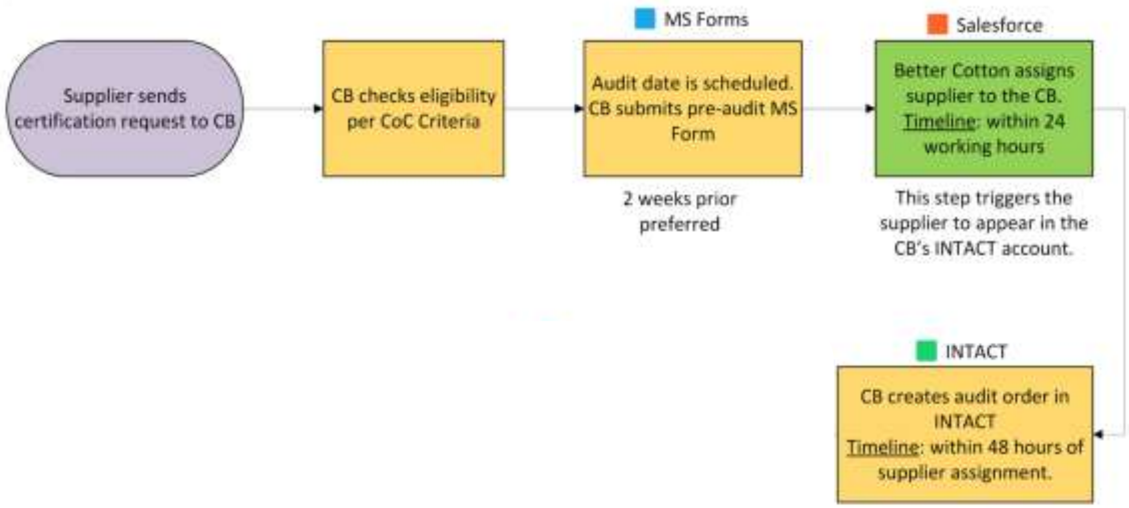


Audit Planning

Auditee allocation to Certification Bodies

In order for a Certification Body to access a CoC supply chain actor or Producer profile in INTACT, Better Cotton must first link these accounts in its CRM system Salesforce.

- **For CoC**
- **Audit Scheduling & MS Form Submission:** Once the audit is confirmed, CBs must submit audit details via the pre-audit MS form, ideally at least 2 weeks before the planned audit date.
- **Supplier Assignment on INTACT**
  After form submission, Better Cotton will assign the supplier to the CB on its internal CRM (Salesforce) within 24 working hours. The supplier will then appear in the CB's INTACT account.
- **Audit Order Creation in INTACT**
  CB admin must create the audit order within 48 working hours, by adding the audit date, assigning the auditor, and other details.



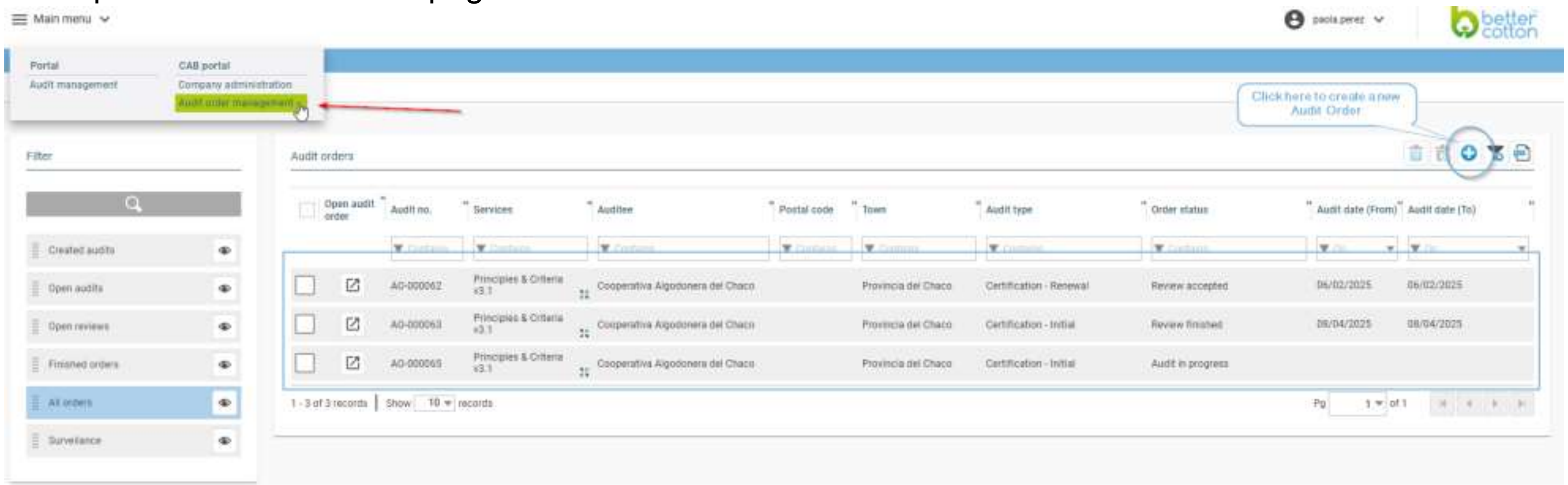
For Producers

- Audit Scheduling still follows current producer allocation process with Better Cotton Asurance team.
- Once allocation of Producers to Certification Bodies confirmed by either the Certification Body or the Producer (depending on scenario), a Better Cotton Assurance staff updates the CRM system Salesforce.
- Within 1 hours, the data is refreshed in INTACT and the Certification Body can access the producer profile in INTACT and schedule an audit order.

Audit

Planning

- When audits are planned, CB Admins must inform Better Cotton by creating or editing audit orders in the **Audit Order Management** section.
- Please note that for CoC audits, CBs are required to complete the Pre-audit MS form. Refer to the guidance provided on the home page of the CB/3PV CoC Resource Centre.



How to Access the Audit Planning Page

- Open the Main Menu (☰)
- Under CAB Portal, click on Audit Order Management

This will open a new window showing all audit orders your CAB is responsible for.

Audit

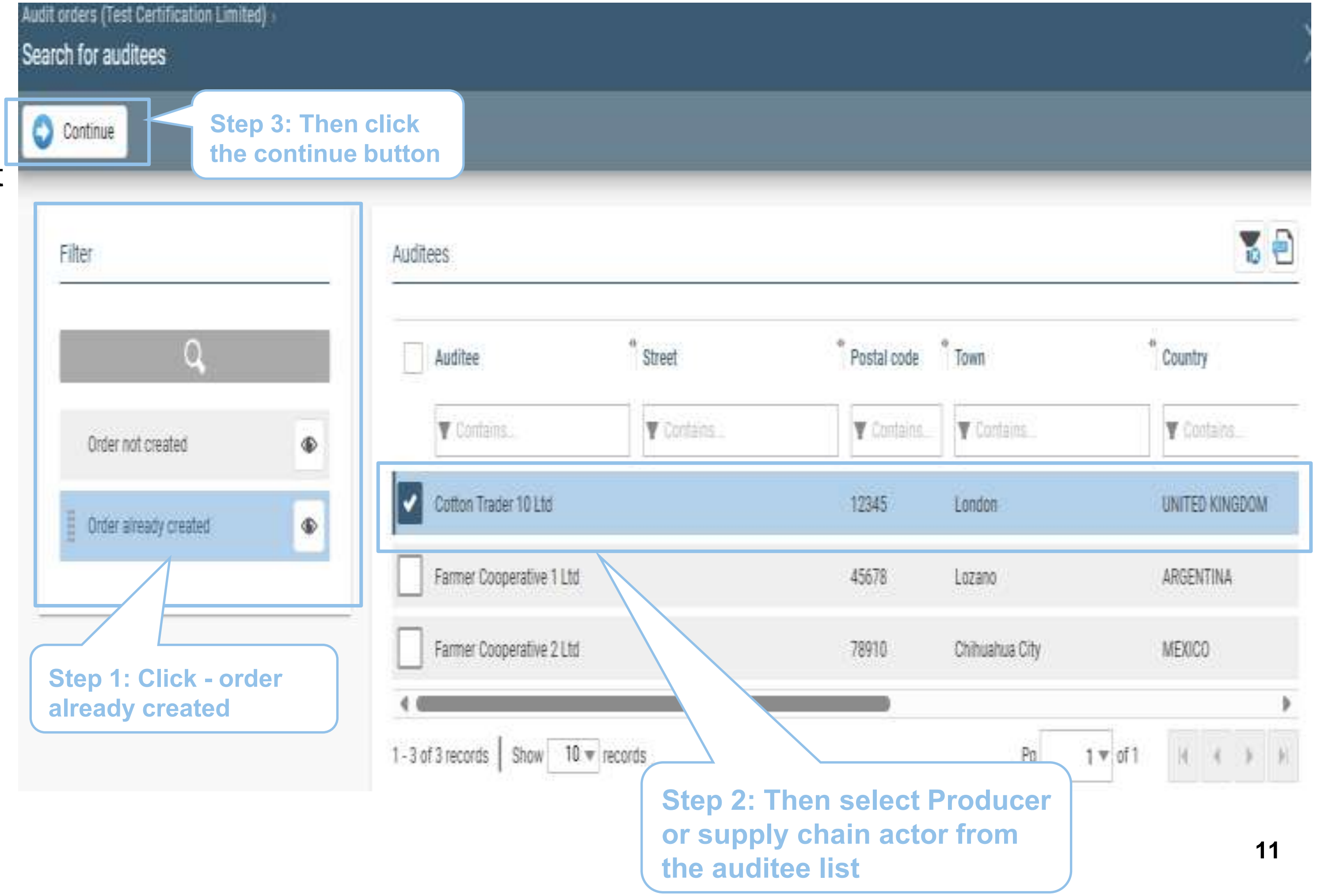
Planning – Select auditee

To plan a new audit, the CB Admin must select the **auditee** from their allocated list

Steps to Start a New Audit

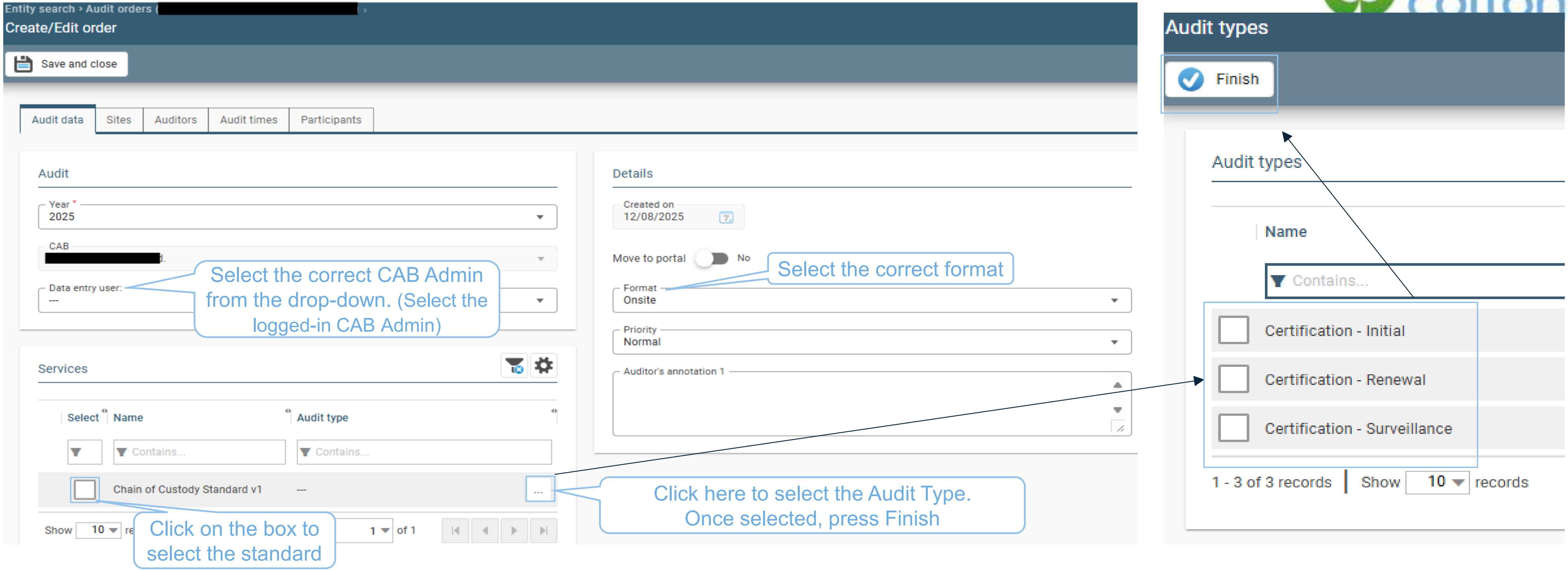
- Click the “New” button (➕) in the top toolbar of the Audit Order Management page (see previous slide)
- This new screen will appear
- Select Order already created on the left.
- Then select a Producer or Supply Chain Actor from the auditee list.
- Then click the continue button.

A new window (see next slide) will open to begin filling out audit details.



Audit

Planning – Create audit order



- Select the appropriate **CAB Admin** from the **"Data entry user"** dropdown list. Warning: if you create the audit order you must select your name as Data Entry User. You cannot allocate the audit order to another user.
- On the right-hand side, select the **audit format** (Remote or Onsite).
- Under **Services**, select the standard and then click the **three-dot icon (···)** to open a new window.
  In this window, select the correct **Audit Type**, then click **Finish** to confirm your selection.

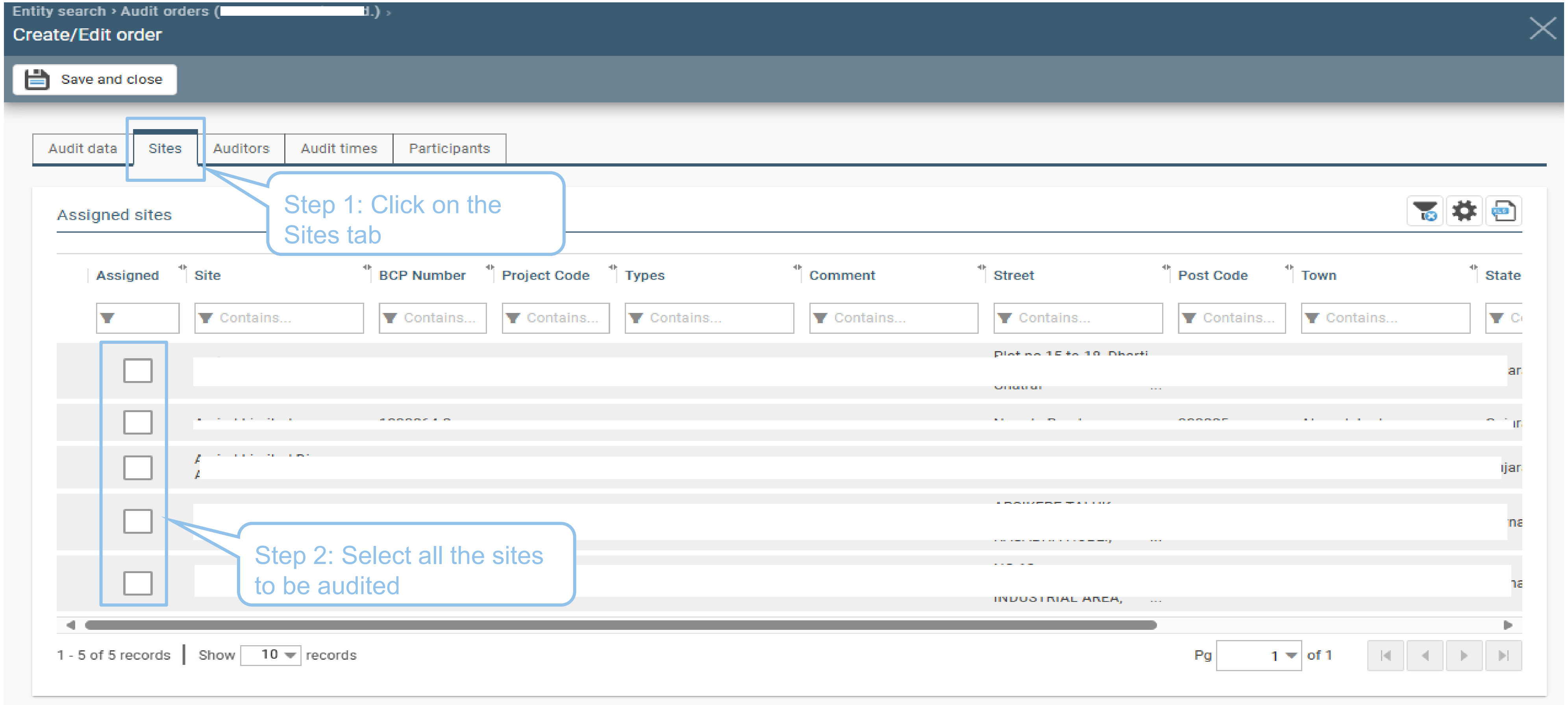
Audit

Only applicable to Chain of Custody Multisite Certification Model.

Planning – Assign Sites, applicable only in CoC Multisite Cases

In the **Sites** tab of the audit order, all associated sites will be displayed based on the information provided by the CB in the pre-audit MS Form.

In the case of a multisite setup for supply chain actors, the CB must **select all sites by default**. The selection of sites actually audited are declared later on in the process: see slide Assigned Sites (Multisite cases)



In case a site is not visible, reach out to compliance@bettercotton.org

Audit

Planning – Assign Lead Auditor to an Audit

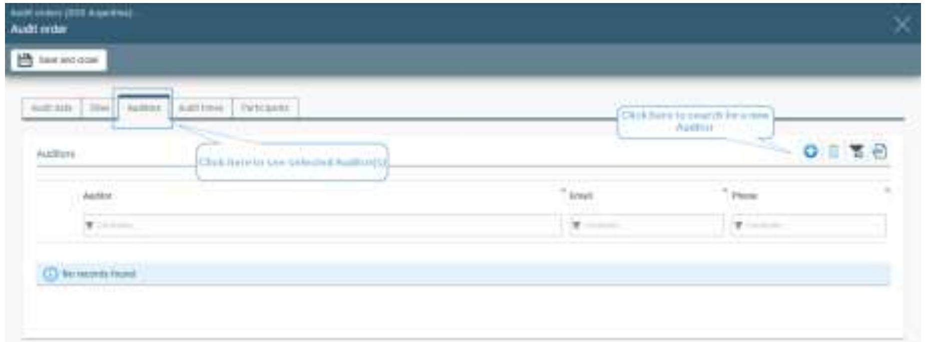
In the **Auditors** tab of the Audit Order, the CB Admin can assign one or more auditors to the audit.

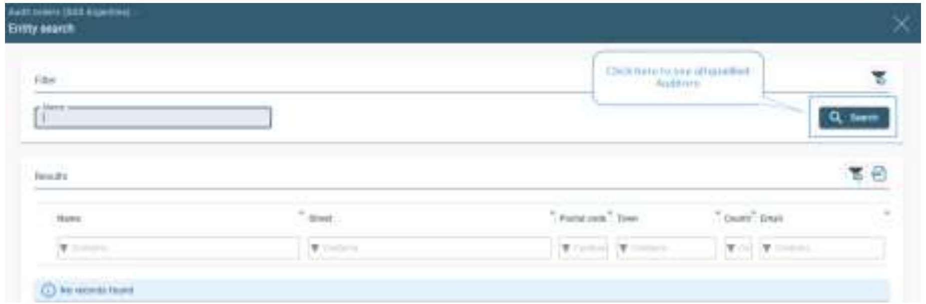
Steps to select the Lead Auditor

- Go to the Auditors tab in the audit order window
- Click the plus icon (+) in the toolbar
- A search page will open - click Search to see a list of auditors linked to your CAB
- Select the Lead Auditor from the list
- Click Save and close to confirm your selection

Important Note

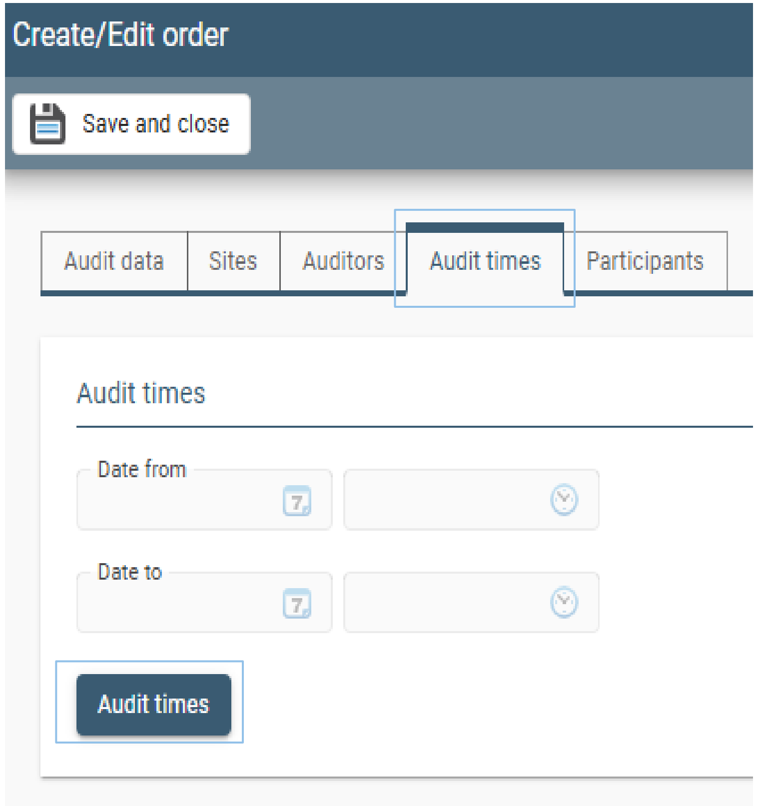
- To add Supporting auditors see slide [Add Audit Team Participants]
- Only auditors **you have declared to Better Cotton** for your CAB will be shown
- It is the CAB responsibility to ensure the auditors selected are qualified to perform the audit as Lead or Support auditors.

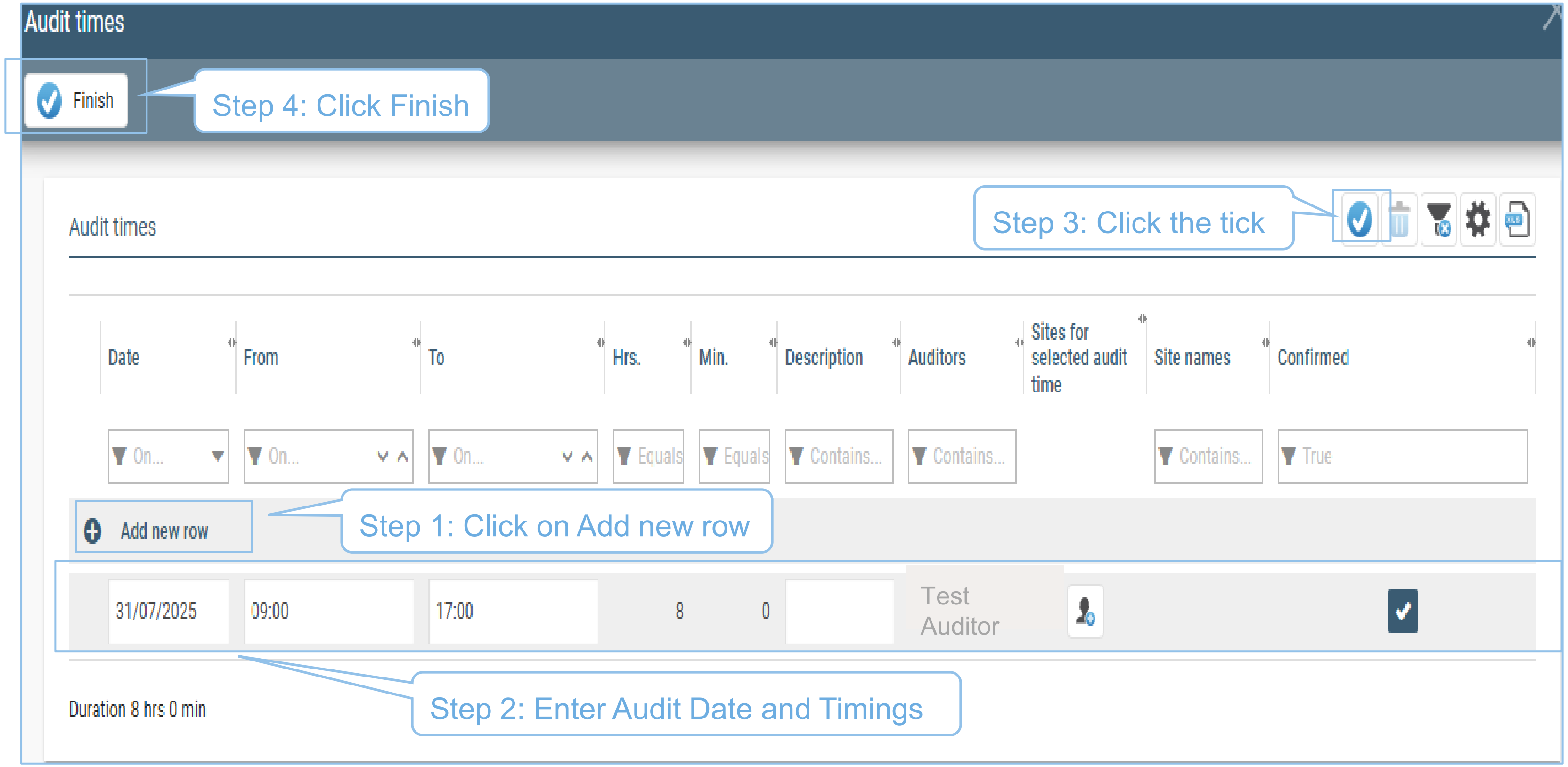




Audit

Planning – Audit Times





In the Audit times tab CB can enter the audit dates and times.
Steps to follow :

1. Go to the Audit Times tab.
2. Click on *Audit Times* - a new window will pop up.
3. Click *Add New Row*.
4. Enter the audit date and timings.
5. If the audit spans multiple days, click *Add New Row* again and enter additional dates and timings.
6. Click the ✓ (tick) to save.
7. Click *Finish* to complete

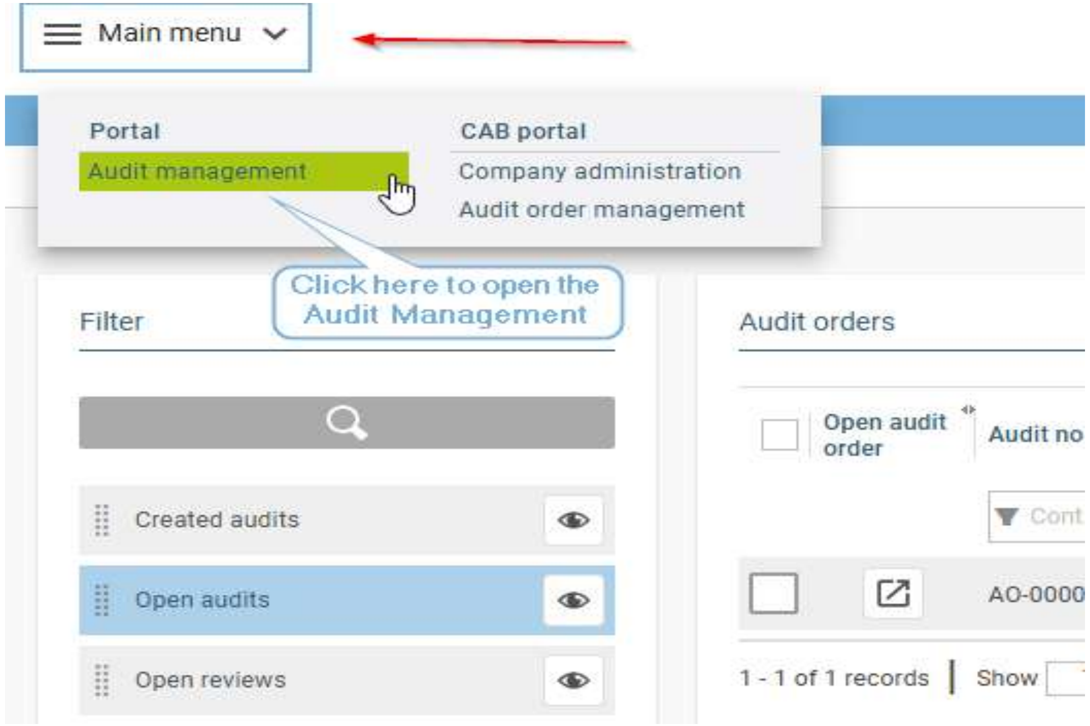
To save the audit order, click on **"Save and Close"**

Audit

Planning – Audit order acceptance

- Go to **Audit Management**
- Select **"Open audits"** in the filter panel on the left
- In the list of audits, click the checkbox next to the audit order and **accept the audit order**.

Note: The top toolbar will only appear after an audit order is selected.

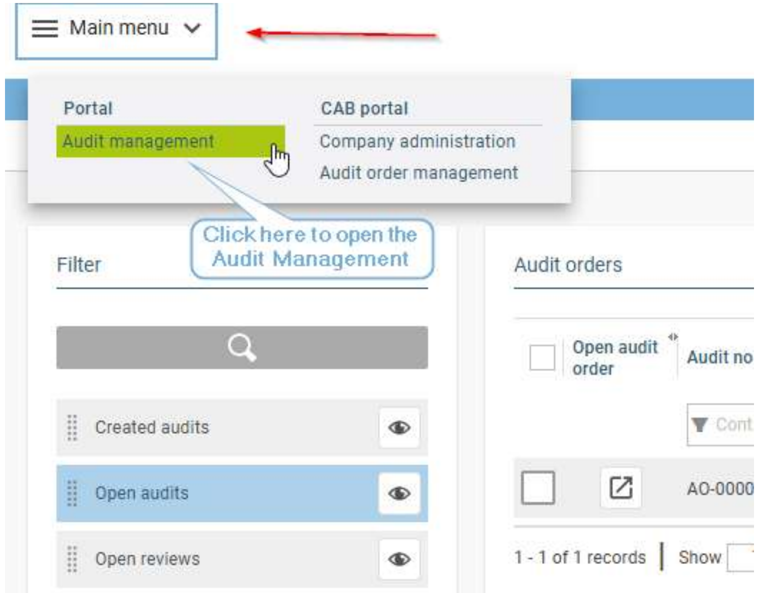


YOU HAVE SUCCESSFULLY CREATED AN AUDIT ORDER IN INTACT.

Audit

Planning – updating an audit

Only applicable if changes to the audit schedule

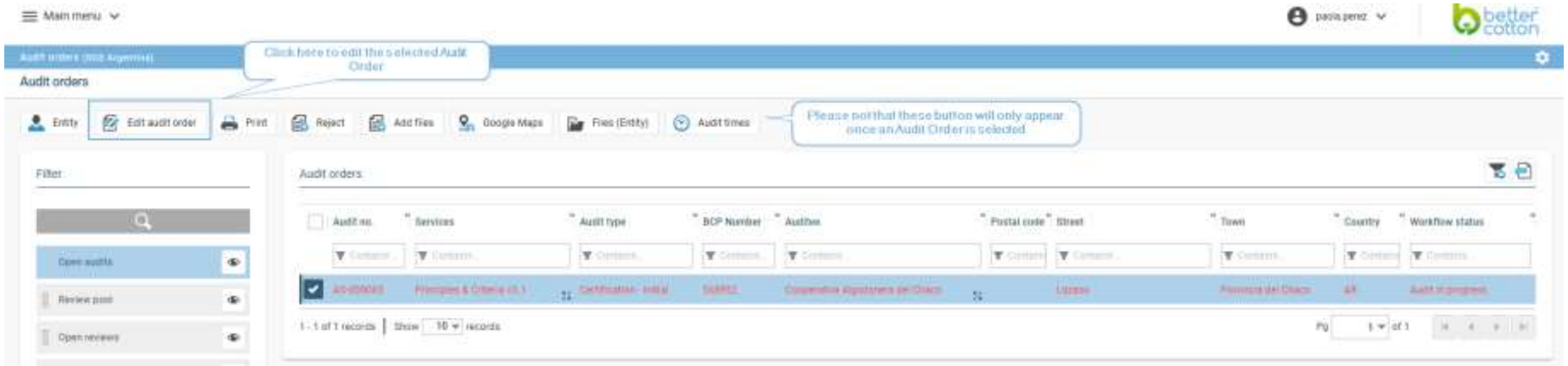


CB Admins can view and update audit details from the **Open Audits** section by selecting and editing an audit order.

Steps to Access and Edit an Audit Order

- Go to **Audit Management**
- Select **"Open audits"** in the filter panel on the left

- Click **Edit audit order** in the top toolbar
- The selected audit will open in a new window where you can review and update all related information



Audit

Planning – updating audit times

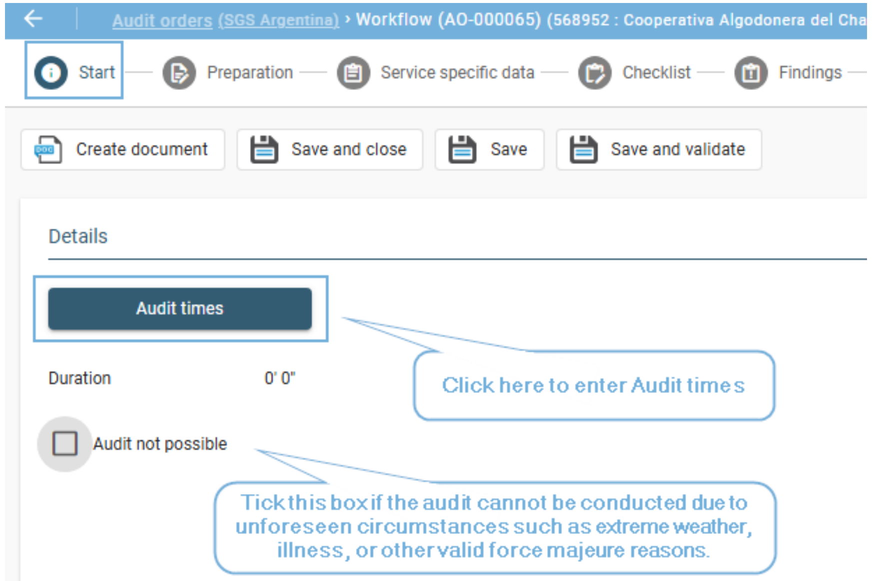
Only applicable if changes to the audit schedule

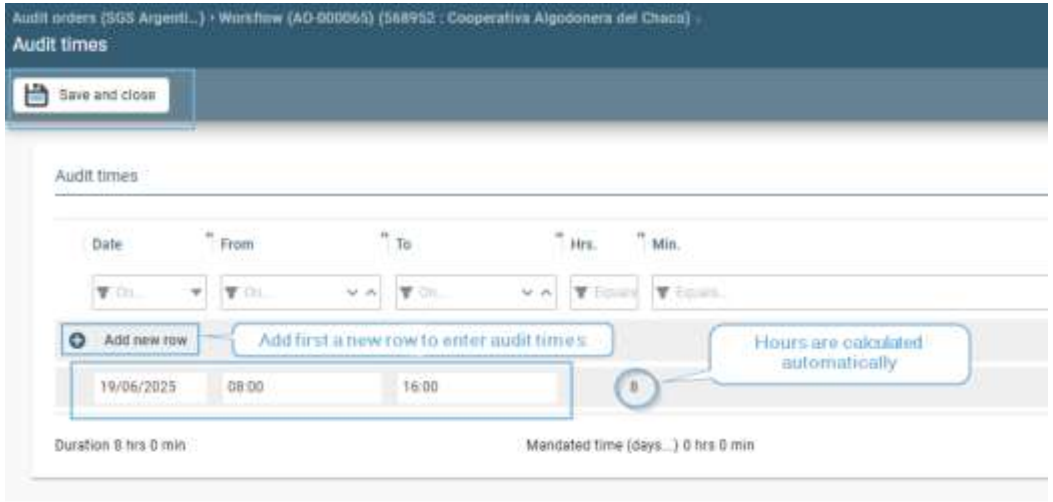
Steps to Enter Audit Times

- In the Start tab, click the Audit times button
- A new window will open
- Click Add new row to enter the audit schedule:
  - Date of the audit
  - From / To time slots

Note: Hours are calculated automatically

Click **Save and close** to complete the entry





Audit

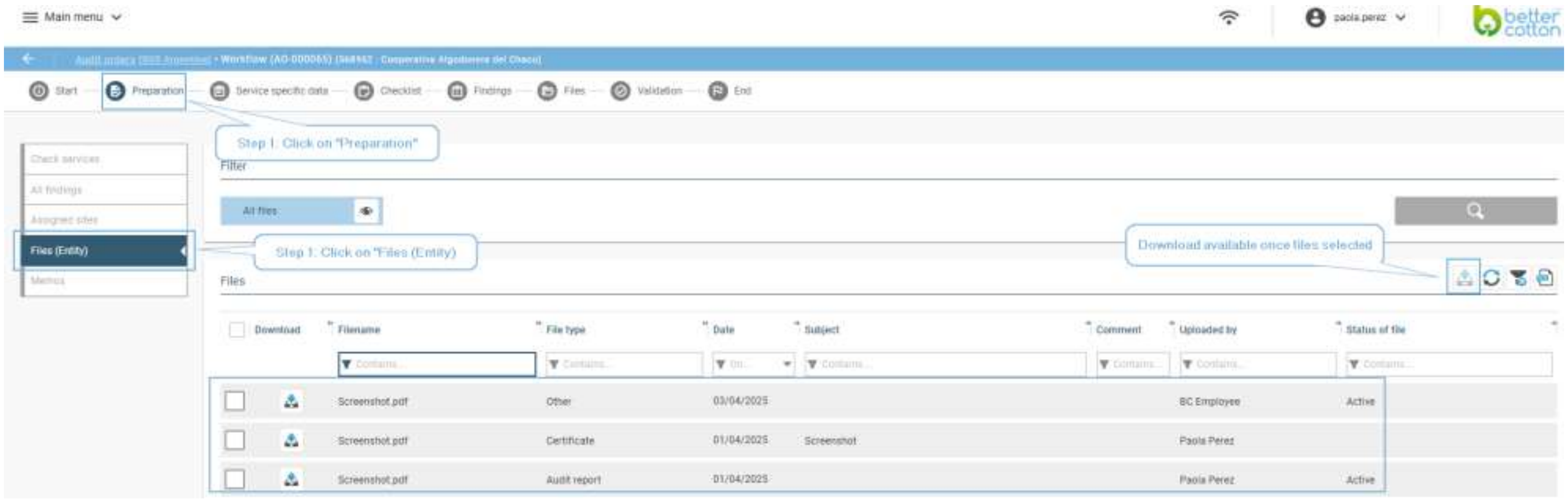
Planning – Preparation - Files

In the **Preparation** tab of the Audit Order, CB Admins can access files uploaded by Better Cotton.

Steps to Access Shared Files

- Click on the **Preparation** tab at the top of the Audit Order workflow
- In the left-hand panel, select **Files (Entity)**
- The list of files provided by Better Cotton appears in the table

Tip: You can download documents directly from this screen and share them with your audit team for preparation.



Audit

Planning – Preparation - Memos

When opening an Audit Order, the CB Admin is notified if Better Cotton has attached a memo to the record.

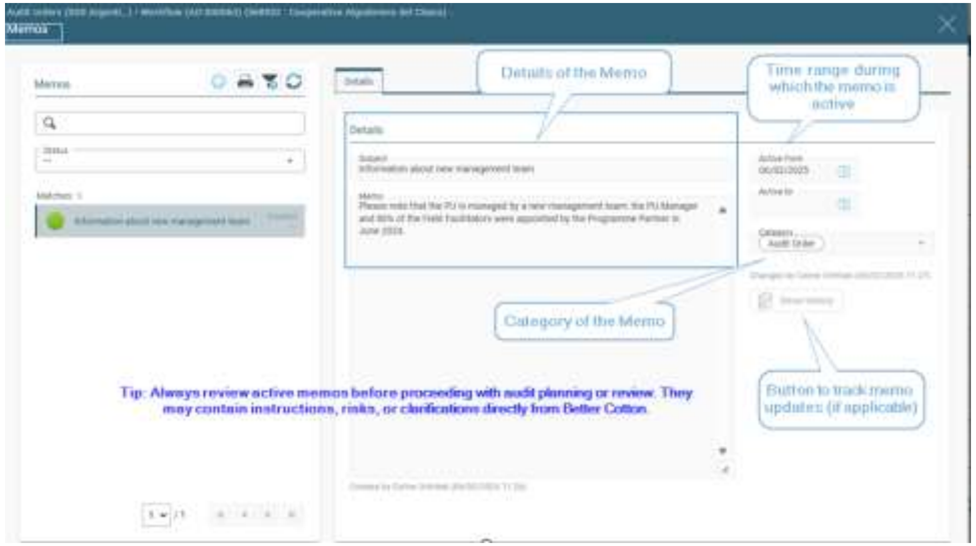
Where to Find the Memo Notification?

- At the top of the **Audit Order workflow page**, a yellow info bar appears with the message: **“x active memo(s) available”**
- Click the **“Open”** link to view the memo content

Explanation of “Active from” and “Active to” Fields in Memos

- **Active from:** This date is set automatically when the memo is created. It marks the starting point of the memo's visibility in the system and reflects the creation date.

- **Active to:**This field is optional and is empty by default. Users can enter an end date to define when the memo should automatically become inactive.
  - If left empty, the memo remains active indefinitely.
  - This setting is useful for memos that are relevant only for a specific period (e.g., temporary audit notes or reminders).
  - Adding an end date is particularly useful for archiving purposes, as it ensures that memos no longer relevant are automatically deactivated while still being retained in the system for historical reference.



TASKS TO COMPLETE IN INTACT AFTER THE AUDIT HAS BEEN CARRIED OUT AND CERTIFICATION DECISION TAKEN.

Completing the Audit

Audit

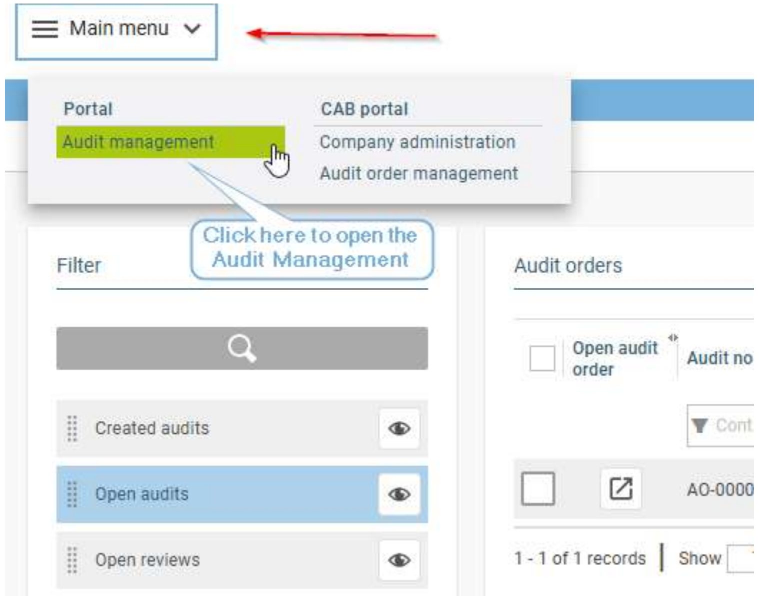
Audit Order – Opening an Audit Order

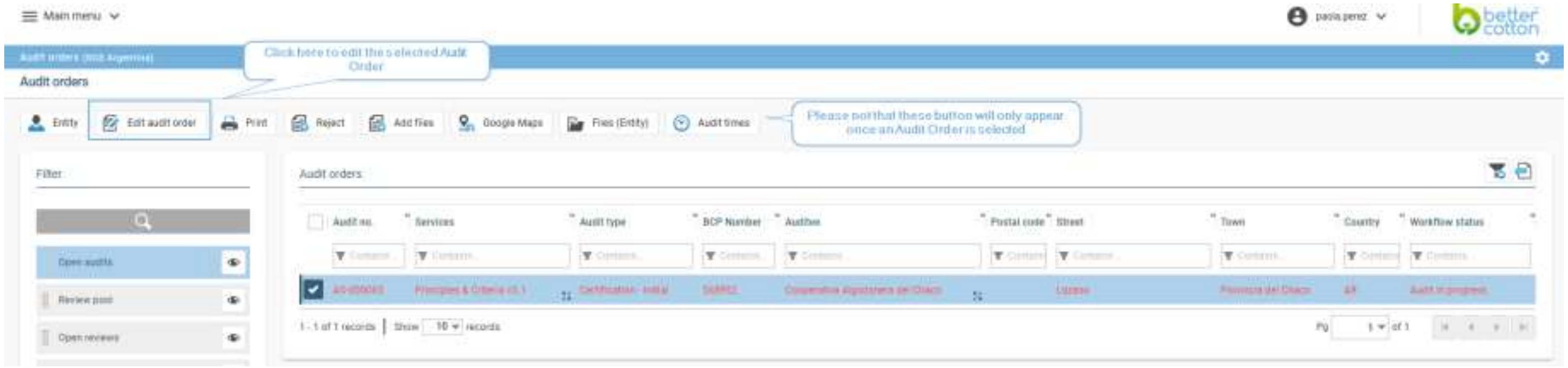
CB Admins can view and update audit details from the **Open Audits** section by selecting and editing an audit order.

Steps to Access and Edit an Audit Order

- Go to **Audit Management**
- Select **"Open audits"** in the filter panel on the left

- Click **Edit audit order** in the top toolbar
- The selected audit will open in a new window where you can review and update all related information



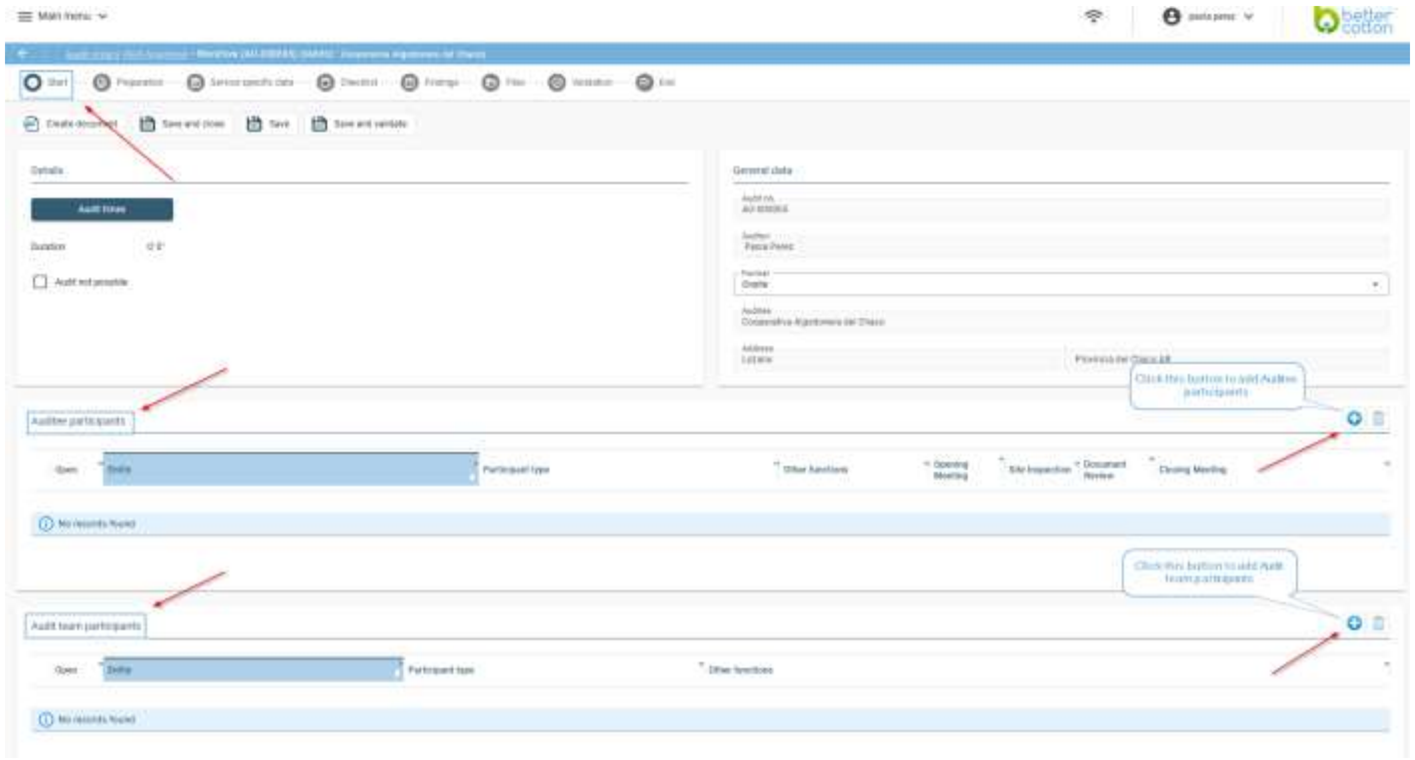


Audit

Audit Order – Add Audit Team Participants

In the **Start** tab of the Audit Order, scroll down to the sections titled **Audit Team Participants** (supporting auditors, lead auditor).

- **How to Add Participants**
- Click the **“+” icon** on the right side of the section → A new window will open
- Select participant and required information
- Click **Finish** to confirm

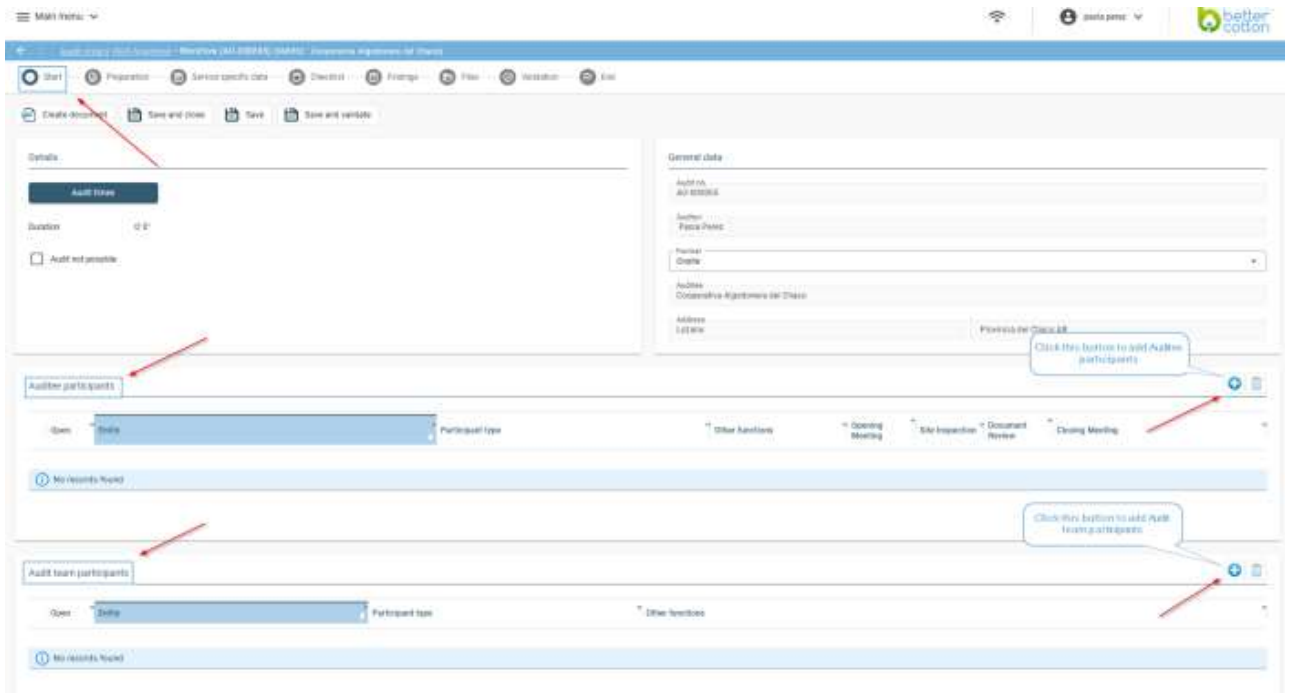


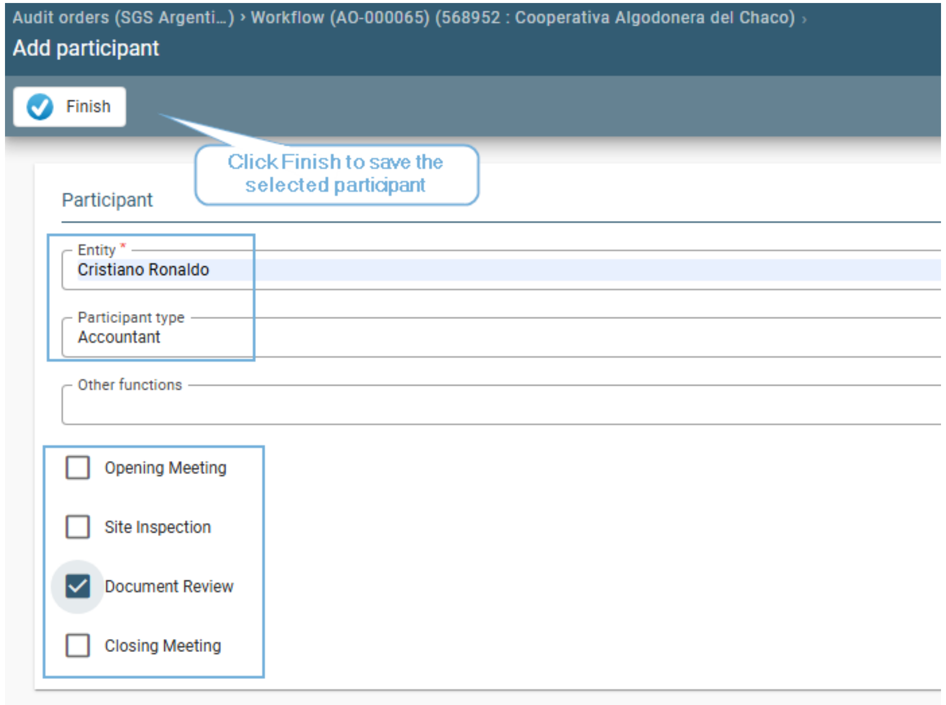
Audit

Audit Order – Add Auditee Participants

In the **Start** tab of the Audit Order, scroll down to the sections titled **Auditee Participants**.

- **How to Add Participants**
- Click the **“+” icon** on the right side of the section → A new window will open
- Select participant and required information
- Click **Finish** to confirm





Auditee participants include Auditee staff, Interpreters, Experts, any observer whether from the CB, Better Cotton or another party.

Audit

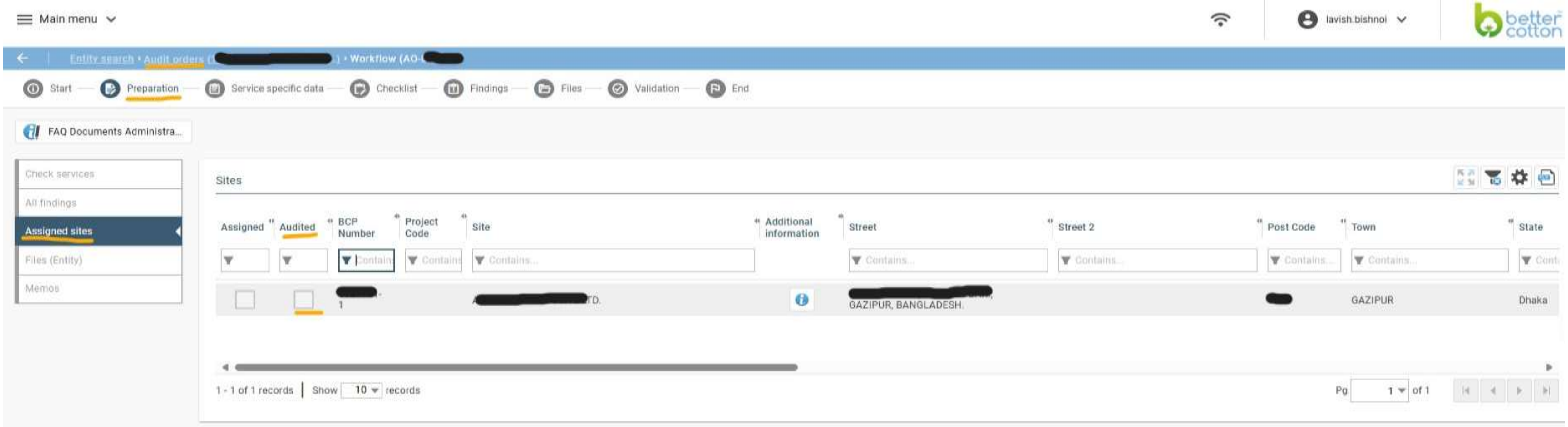
Only applicable to Chain of Custody Multisite Certification Model.

Audit Order - Assigned Sites - for Multisite Cases only

In the **Assigned Sites** tab of the Audit Order, CB Admins must select the specific sites under the audit scope. This step is essential in the case of multiple sites, as it enables the addition of **Non-Conformities (NCs)** to individual sites while filling the checklist.

Steps to select the sites

- Click on the **Preparation** tab at the top of the Audit Order workflow
- In the left-hand panel, select **Assigned Sites**
- Tick the checkbox next to each site that was audited



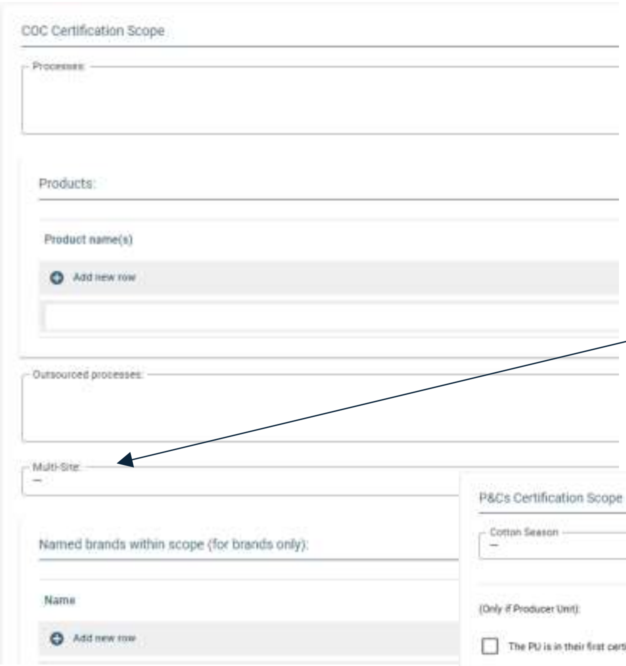
Audit

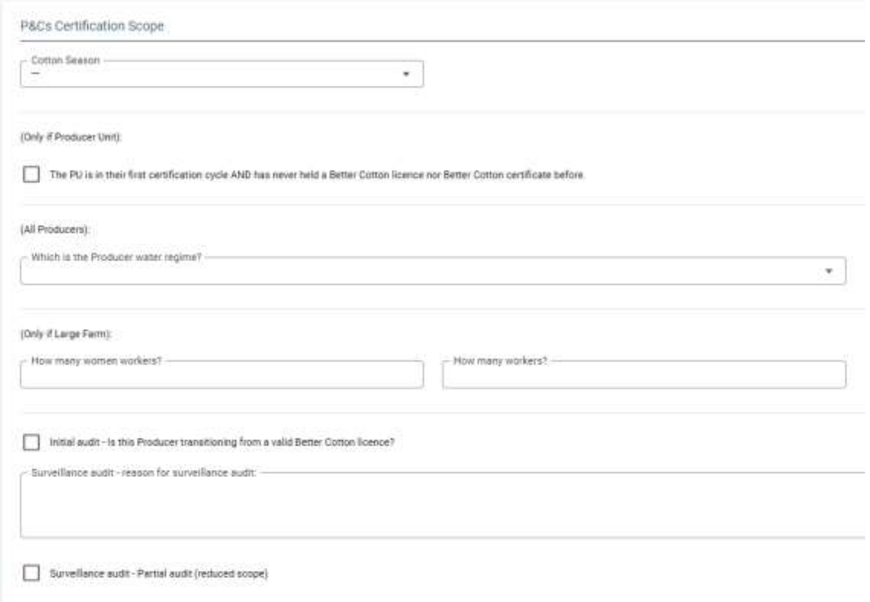
Audit Order – Certification Scope (Service Specific Data)

In this step, CB Admin are required to enter audit-specific details.

Instructions:

- Navigate to the **Certification Scope (Service Specific Data)** tab in the audit order menu
- Based on the Auditee classification, the tab will display either;
  - **P&Cs Certification Scope** (for producers)
  - **CoC Certification Scope** (for supply chain actors)
- Complete all applicable fields to confirm additional information relating to the scope of the audit you have just performed.
- Click Save or Save and close





Complete all the applicable fields.

Select **Yes** in case of a multi site structure.

Audit

Audit Order – Checklist

Working with the Checklist

- Navigate to the **Checklist** tab of the Audit Order.
- On the left, you'll find a navigation menu that displays the list of indicators applicable to the current audit order:
- For **Supply Chain Actors**, the checklist includes Chain of Custody (CoC) requirements
- For **Producers**, the checklist contains Principles & Criteria (P&C) indicators, which are automatically tailored based on the producer classification (LF, MF or SH)

Entering Information

- On the right-hand side, you can enter information for each indicator
- **By default, all indicators are set to "In Conformity"**
- You are required to:
  - Record **Non-Conformities and Observations** (including grading and description)
  - Set indicators that are **not applicable** to the correct status ("Not applicable")

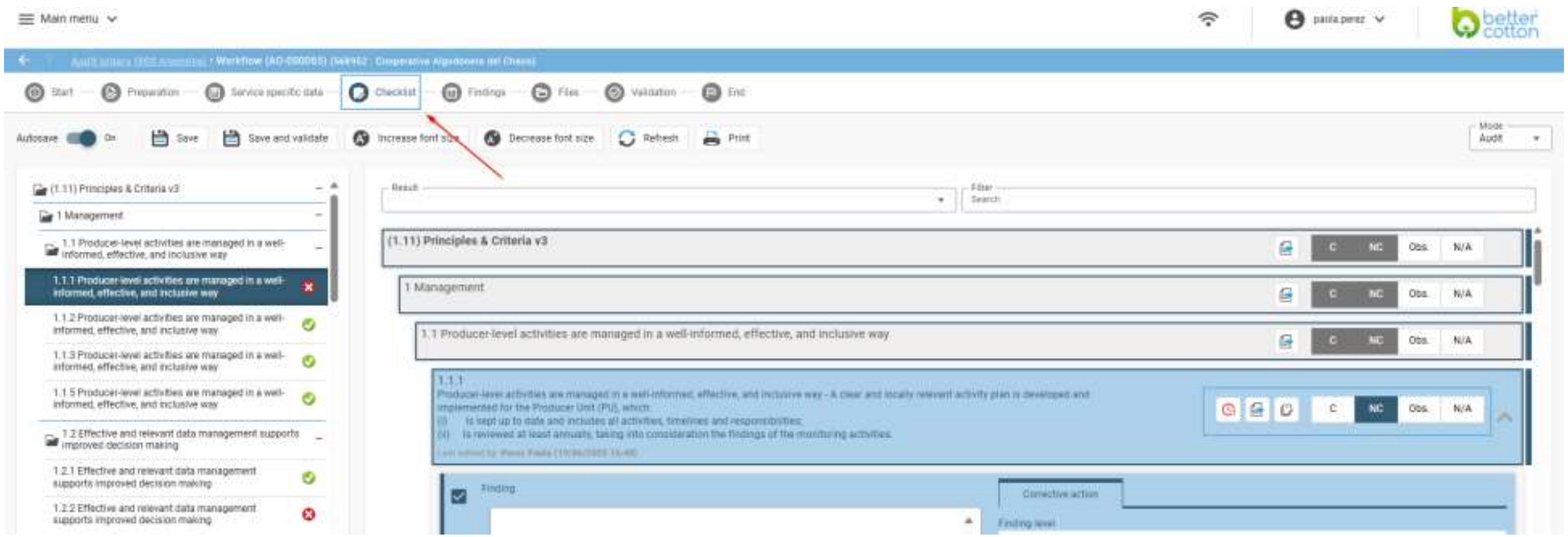
Note: No data entry is needed for indicators that are in conformity – this information is captured in te audit report file.

Note for 2025 audits

Checklists are allocated based on the Auditee profile:

- P&Cs V3.1
- CoC V1
- CoC V1.1

The checklists for P&Cs V3.1 and CoC V1 also include a set of requirements applicable to Large Farm Group Certification model and CoC Multisite Certification model. If not applicable, set these requirements as not applicable.



Audit

Audit Order – Non-Conformity

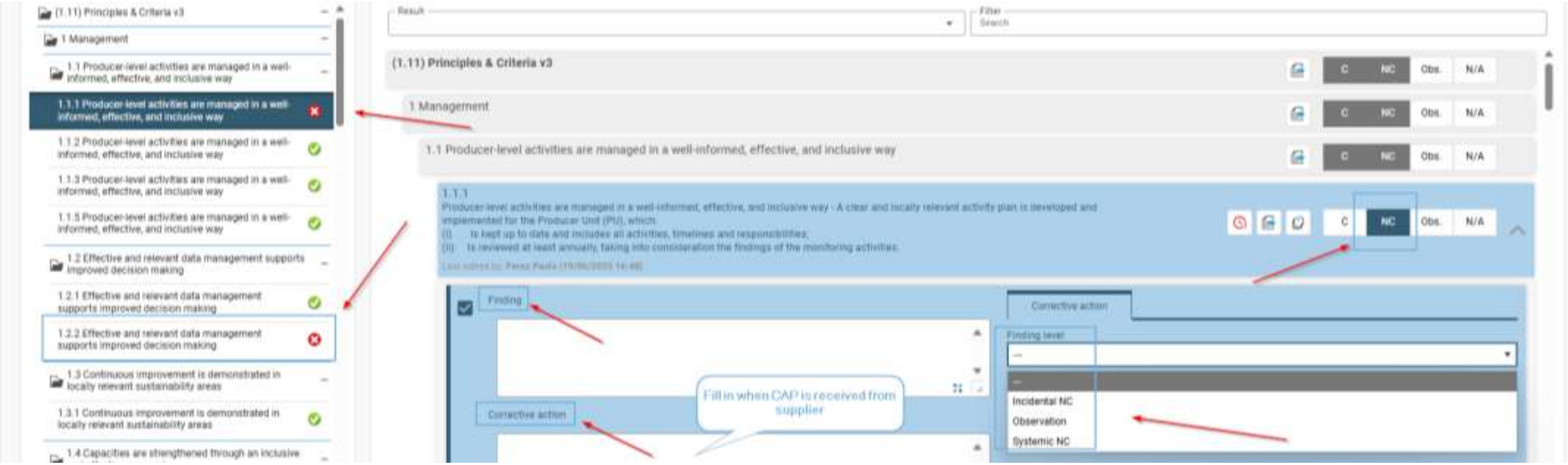
Recording a Non-Conformity

If a Non-Conformity (NC) is identified during the audit:

- Click the “NC” button next to the relevant indicator
- A new window will open
- Enter all required details and select the appropriate Finding Level from the dropdown menu
- Once saved, the indicator will be marked with a **red X** on the left-hand side to indicate the NC

For multisite, refer to the slide [Finding (Multisite cases)].

Tip: Ensure all NCs are documented clearly and accurately to support consistent technical review and certification decisions

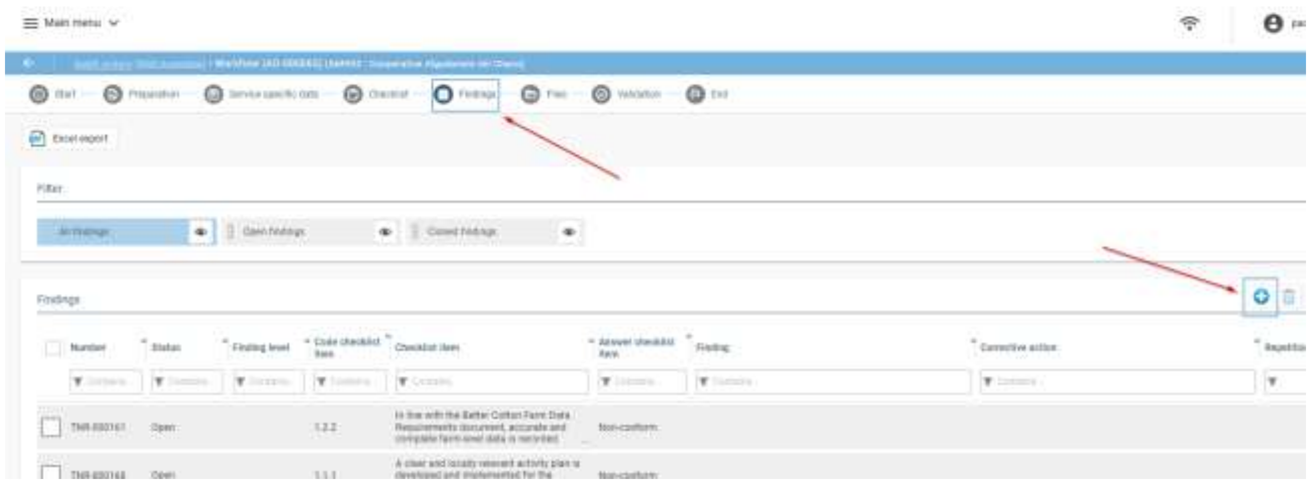


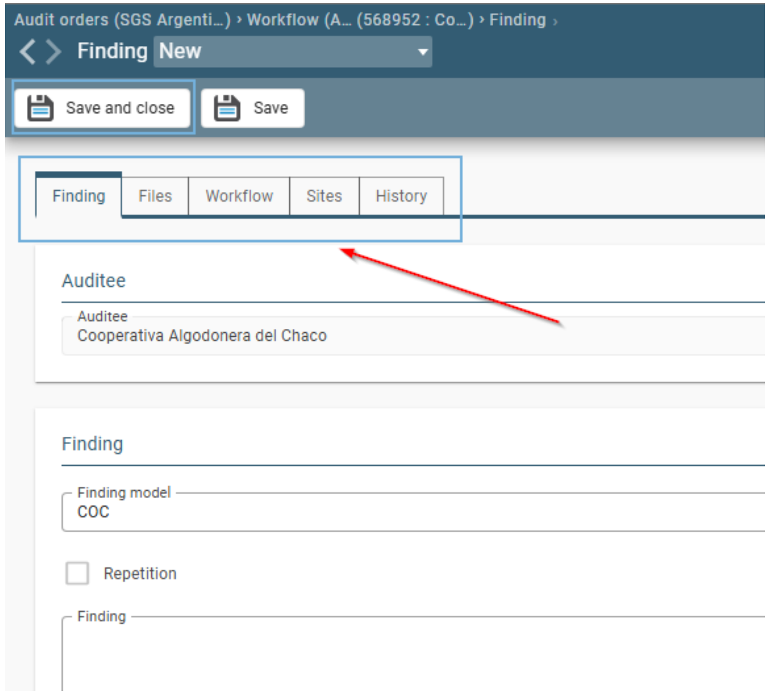
Audit

Audit Order – Finding

If a Non-Conformity or Observation has been recorded in the checklist, corresponding details must be entered in the Findings tab before the audit order can be completed.

- **How to Add a Finding**
- Go to the **Findings** tab within the Audit Order
- Click the **“+” icon** to add a new finding
- A new window will open
- Enter all relevant details
- Click **Save and Close** to confirm the entry





Important Notes:

- All findings (NCs, Observations) and Corrective Action Plans (CAPs) must be entered directly into Intact.
- The audit order shouldn’t be finalized until all applicable findings are entered and saved.
- The Corrective Action Plan (CAP) file will be manually created by the CB.
- The CB is also responsible for manually entering the Corrective Action and Root Cause Analysis details under each finding, once received from the PUM

Audit

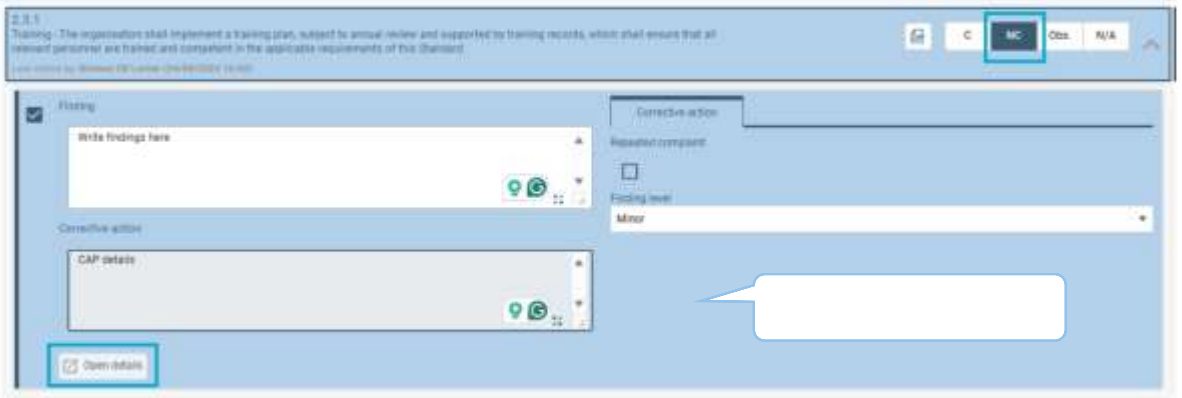
Only applicable to Chain of Custody Multisite Certification Model.

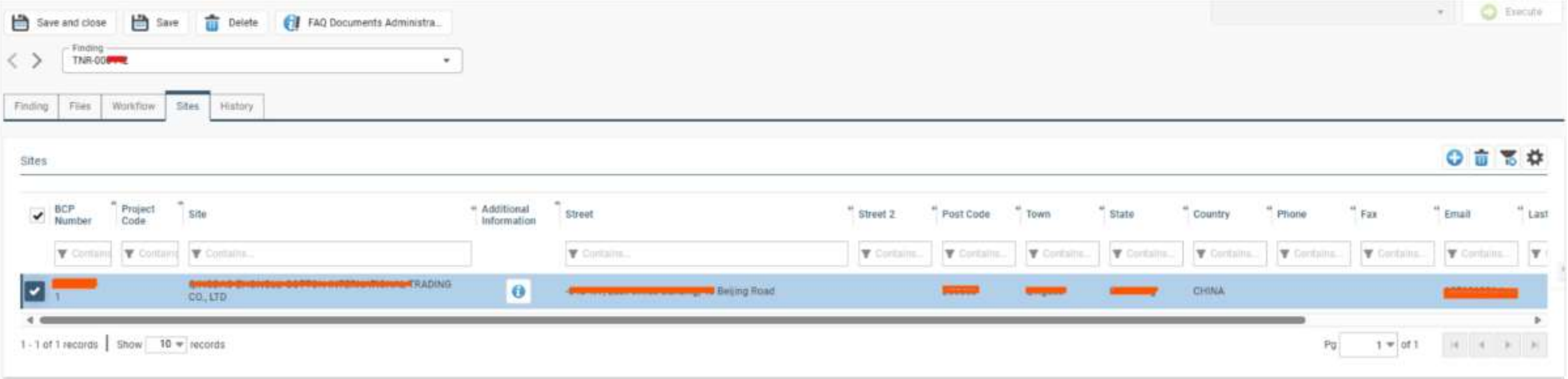
Audit Order – Finding – <u>for multisite cases</u>

Currently, checklist results in Intact are not site-specific for multisite audits. To ensure accuracy and traceability of audit findings, CBs are required to follow the steps below:

If a non-conformity (NC) is found at a particular site:

- Mark the relevant clause as NC in the **checklist** and Log the detailed finding under the Findings section by clicking on **"open details"**
- Navigate to the 'Sites' tab and select the specific site where the NC was identified
- Enter all relevant details under the finding as mentioned in the previous slide.
- Click **Save and Close** to confirm the entry



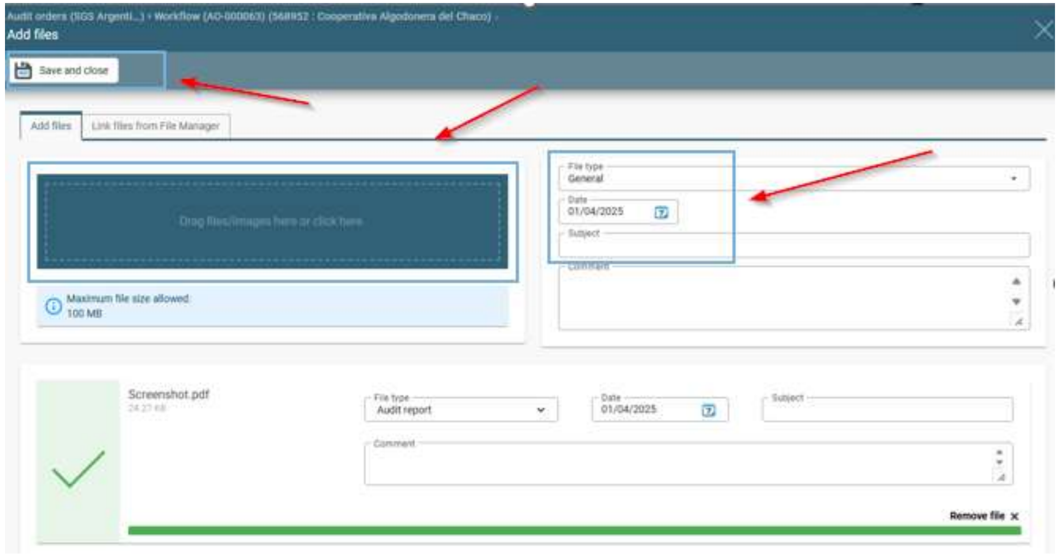


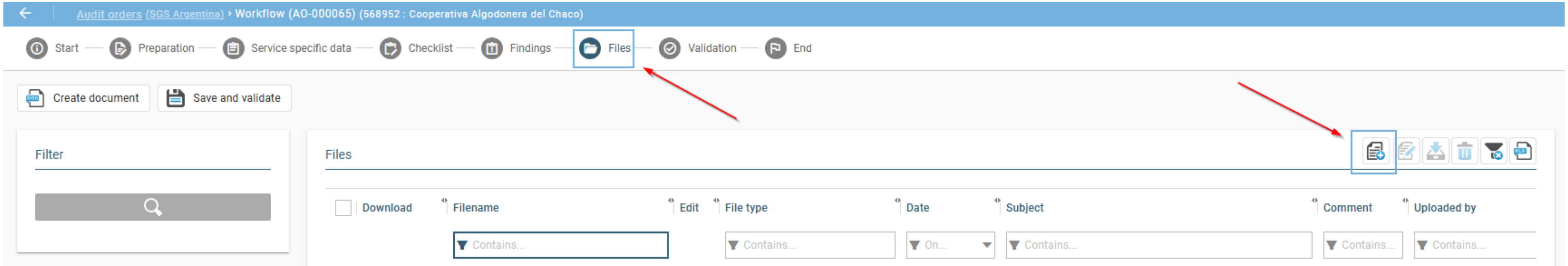
Audit

Audit Order – Files

How to Upload the Audit Report

- Go to the **Files** tab in the Audit Order
- Click the **document icon** on the right side of the toolbar
- A new window will open where to upload the audit report file
- Select **"Audit Report"** as the file type
- Fill in any required fields
- Click **Save and Close** to complete the upload





Note: The audit report is completed by the CB in Excel and uploaded to Intact. In addition, all findings (NCs, Observations) and Corrective Action Plans (CAPs) must be entered directly into Intact.

Audit

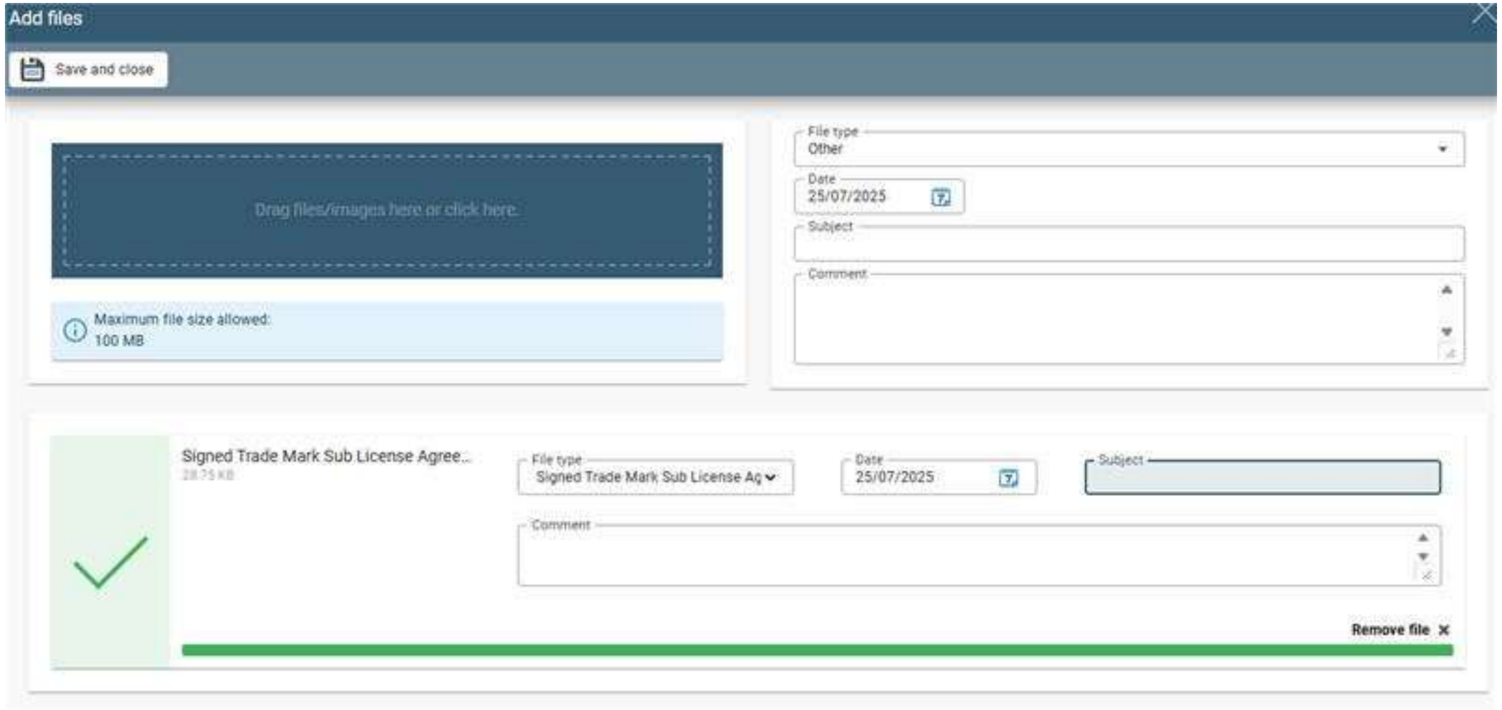
Audit Order – Files (TM)

Only applicable to Chain of Custody actors who have signed a Trade Mark Sub License Agreement with the Certification Body.

Signed Trade Mark Sub License Agreements must be uploaded to INTACT. It is preferable for the signed document to be uploaded in the files section of an audit order in INTACT at the same time as the final audit report and certificate. Simply upload the document, select the relevant file type and save.

If the signed document is not available on time, the finalisation of the audit order on INTACT (including upload of the audit report and Certificate) must not be delayed. The Signed Trade Mark Sub License Agreement file can be uploaded directly to the 'Files' section of the auditee profile in INTACT at a later date once the agreement has been signed.

Access to the Canto folders must not be given until the Trade Mark Sub License Agreement has been signed and uploaded.



For more information, refer to the Better Cotton Claims & Label Guidance for Certification Bodies

Audit

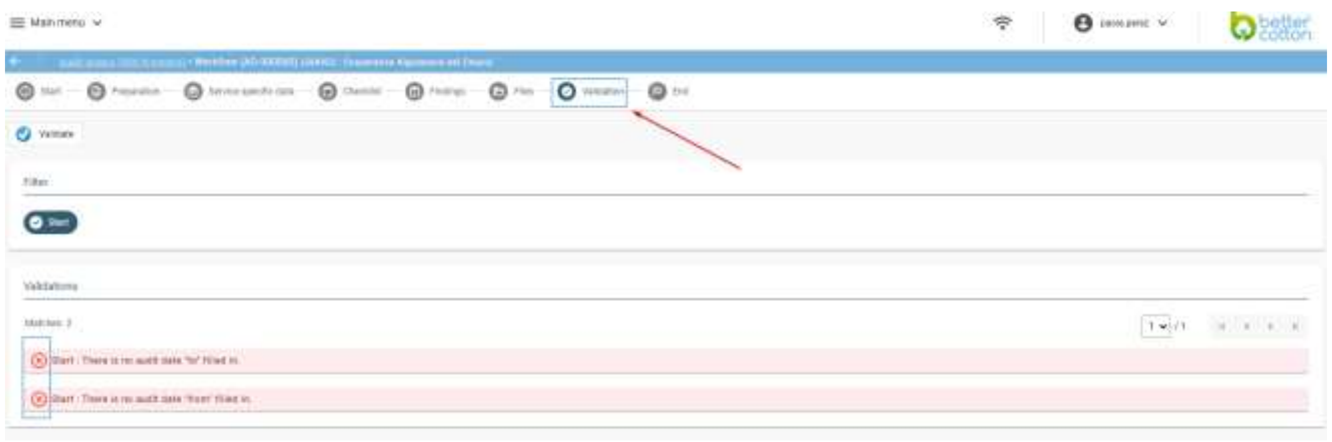
Audit Order – Validation

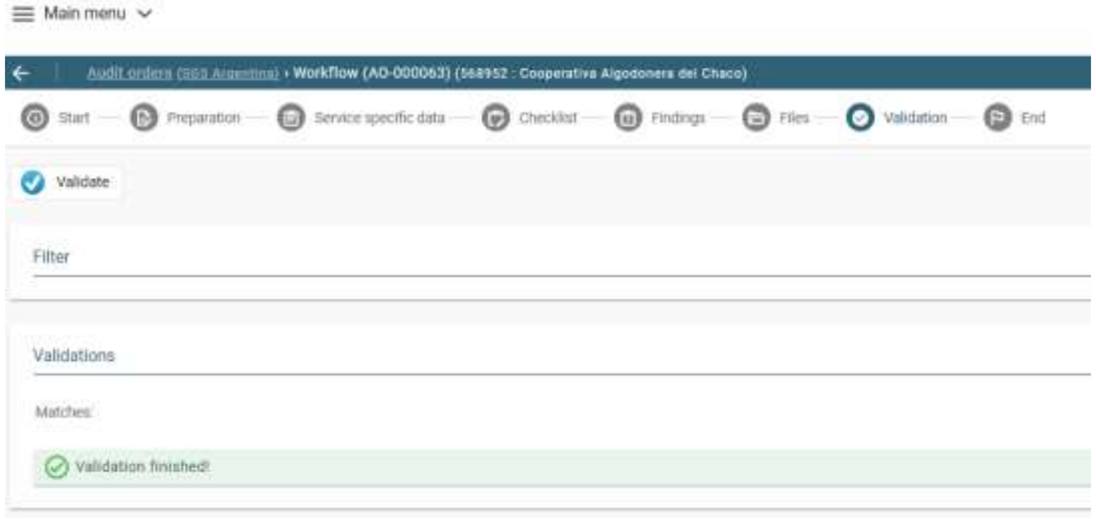
The **Validation** tab helps the CB Admin to ensure that all required steps of the audit have been completed before the audit order can be finalized.

How It Works

- The system automatically checks for missing information or incomplete steps
- If any required action is still pending, a message will appear
- Click on the message to be redirected directly to the task that needs to be completed

Tip: Always use the Validation tab as your final step to ensure the audit is ready for review and submission.





Audit

Audit Order – Finishing the audit

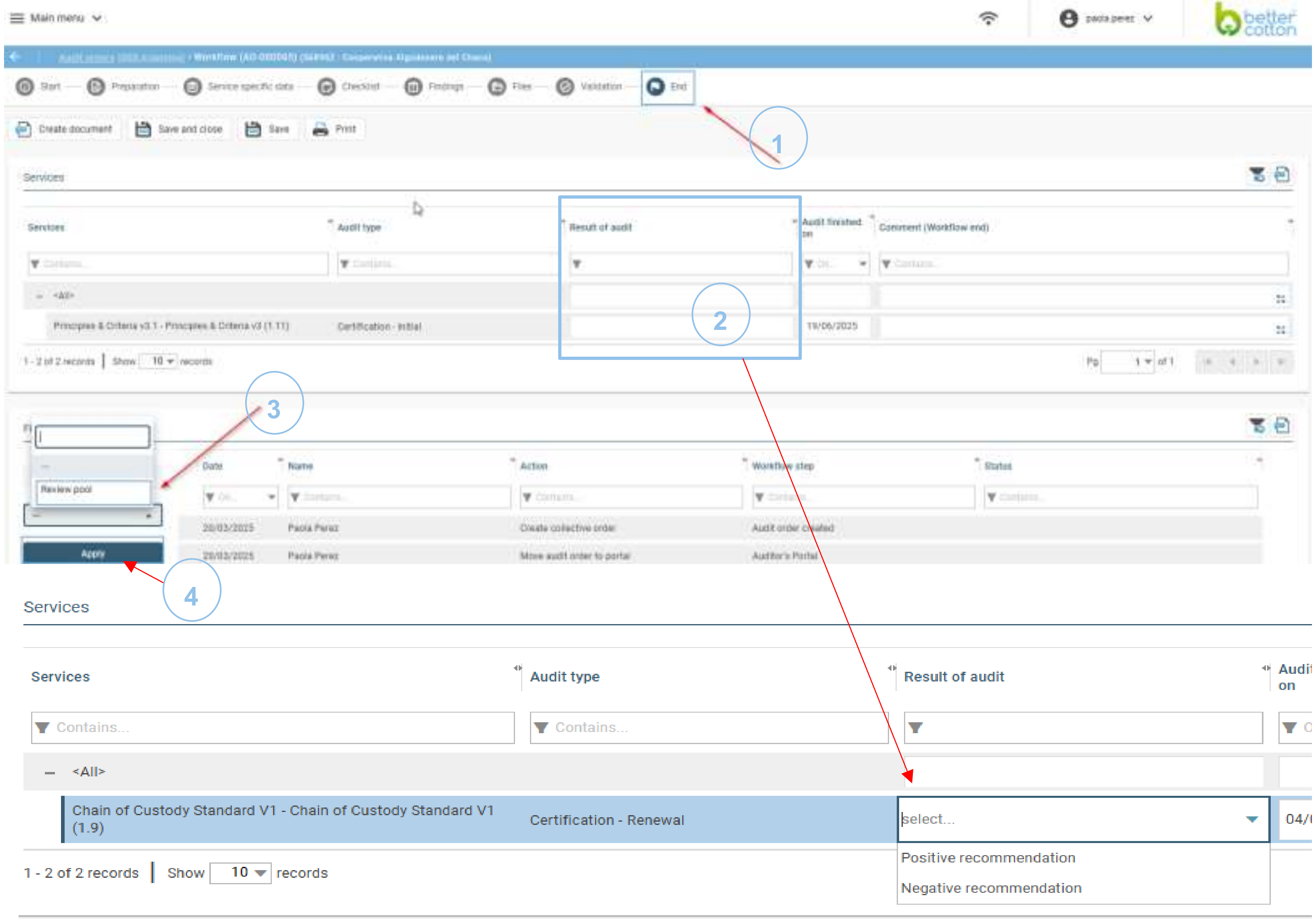
Once required information is complete and validated, the CB Admin can finalize the audit and submit it for review.

Steps to Finish the Audit

- Go to the **End** tab of the Audit Order
- In the bottom-left corner, open the **“Review Pool”** dropdown menu
- Select the appropriate review pool
- Click the **“Apply”** button

The audit order will now be forwarded to the technical review step.

Tip: Only use this step after all findings, documents, and audit data have been entered and the Validation tab shows no remaining tasks.



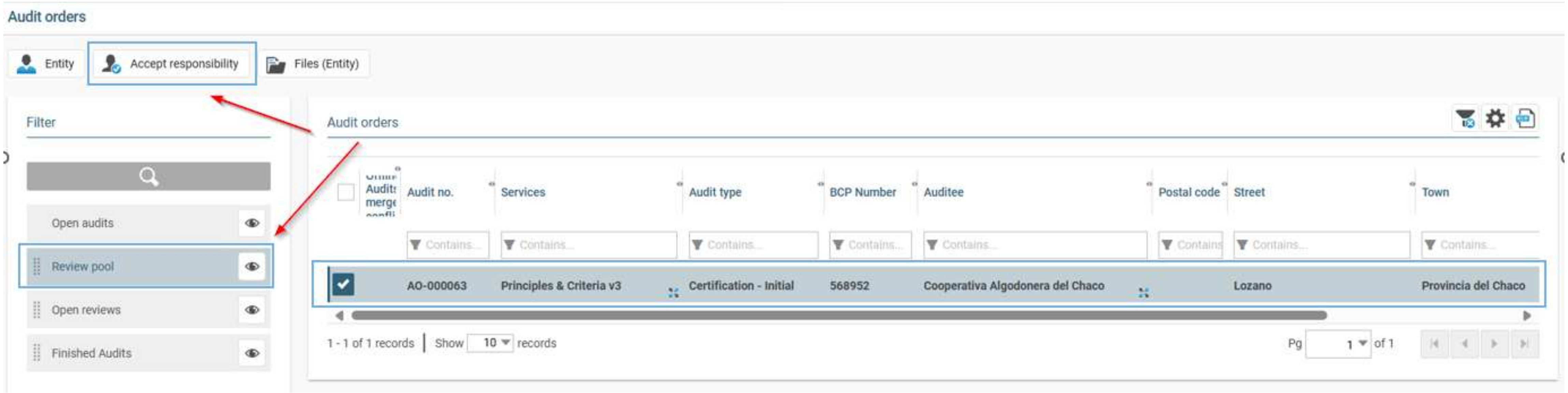
Audit

Audit Order – Review

After submitting the audit, the CB Admin is redirected to the **Start page**. The audit is now waiting in the **Review Pool**.

Steps to Accept the Audit for Review

- In the left-hand menu, click **Review pool**
- Locate the audit order — it will now appear in this list
- Click the **checkbox** next to the audit order to select it
- A toolbar will appear at the top of the screen
- Click **“Accept responsibility”** to assign the audit to yourself for review



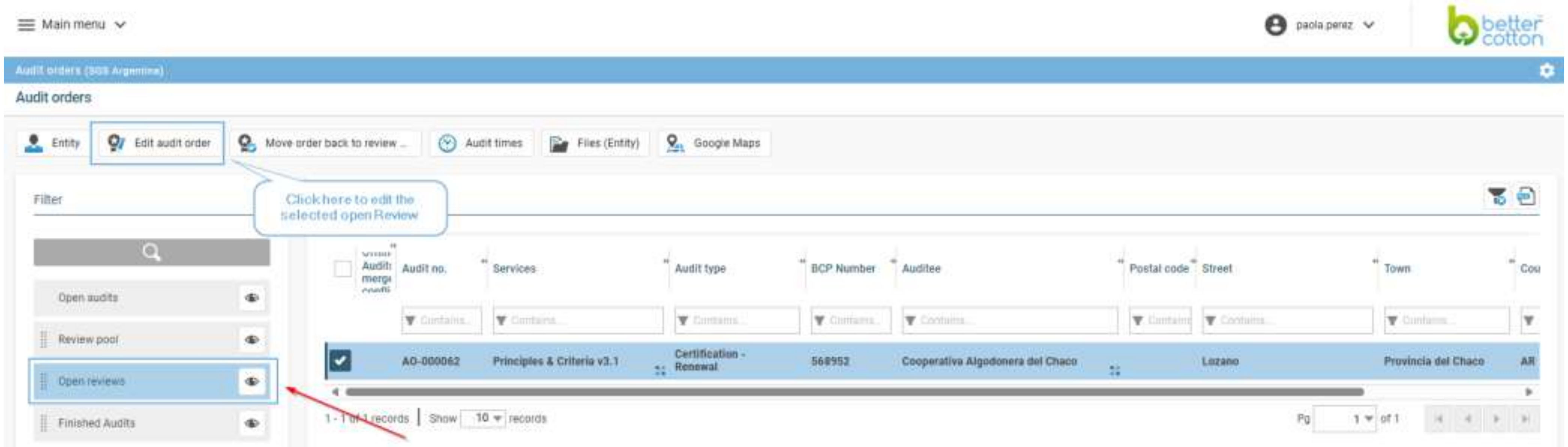
Audit

Audit Order – Review

Once CB Admin accepted responsibility, the user can open the audit order to begin the review.

Steps to Open the Audit for Review

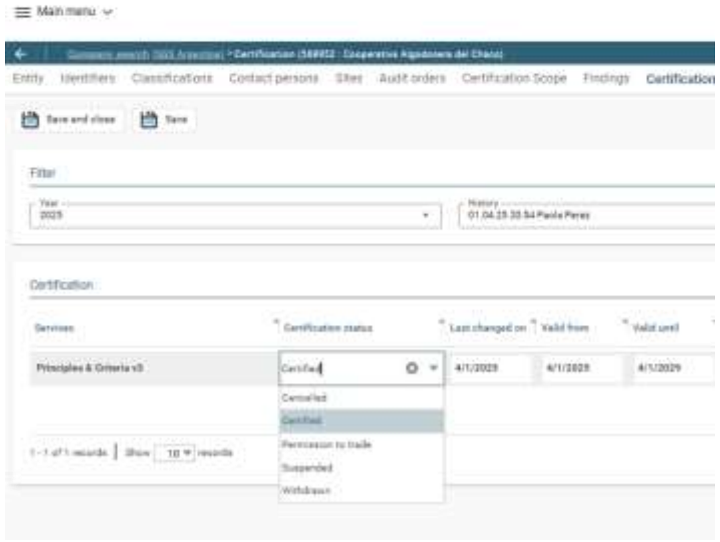
- In the left-hand menu, click **"Open Reviews"**
- Click the **checkbox** next to the audit order to select it
- A toolbar will appear at the top of the screen - click **"Edit audit order"**
- The audit order will open in a **new window** for review



Audit

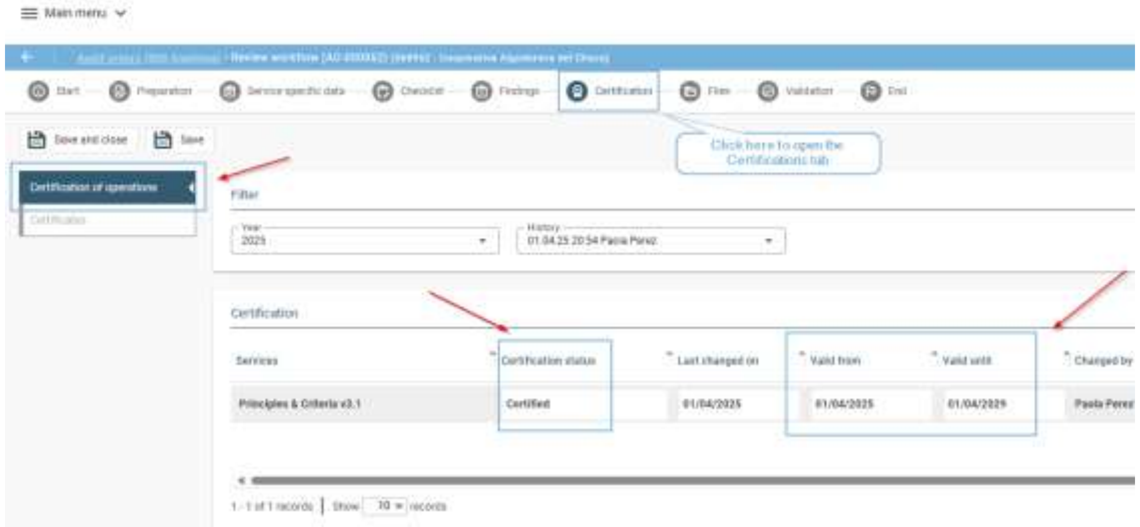
Audit Order – Certification

As the reviewer, you can now update the **certification outcome** based on the audit results.



Steps to Record the Certification Status and validity

- Go to the Certification tab
- On the left, click “Certification of operations”
- In the Certification Status dropdown, select the appropriate outcome
  - Available Certification status options**:**
    - Cancelled
    - Certified
    - Permission to trade
    - Suspended
    - Withdrawn
- Enter the Valid From and Valid To dates
- Click Save and Close to confirm the certification decision

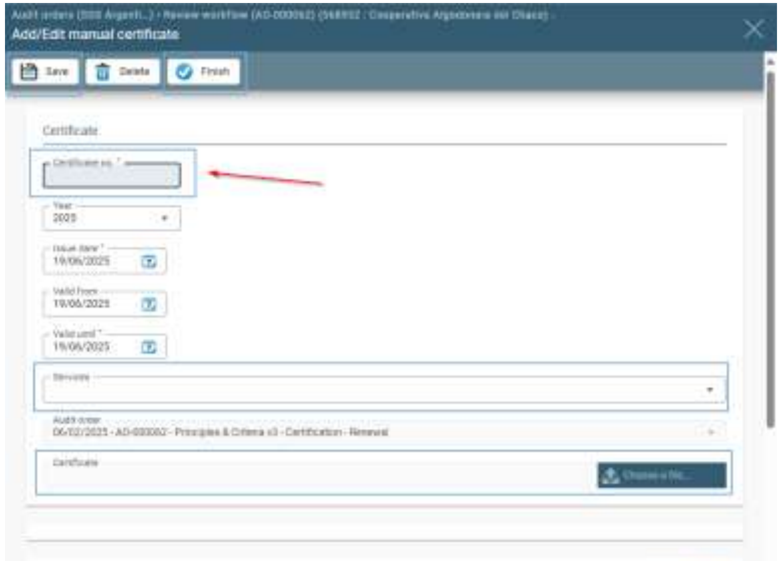


- **Note:** This tab triggers Better Cotton to update the **Physical Site CoC** access for suppliers. If this tab is left blank, suppliers will **not** receive access to the **Physical** on their BCP account.

Audit

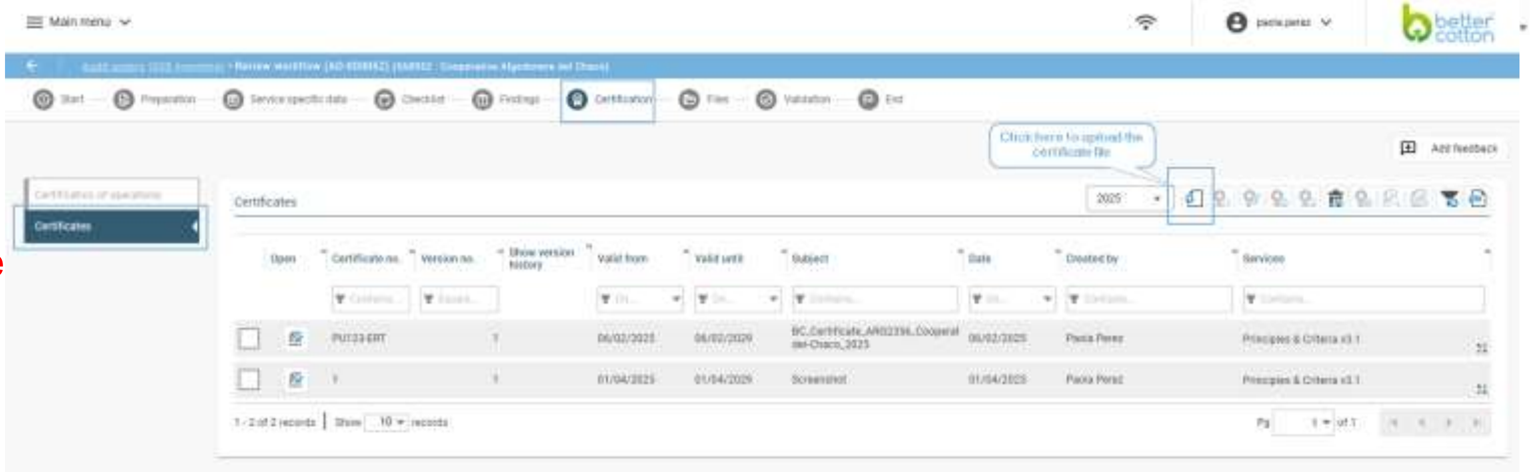
Audit Order – Certificate

After entering the certification decision, the reviewer must upload the official certificate.



Steps to Upload the Certificate

- In the **Certification** tab, go to **“Certificates”** on the left
- Click the **document icon** on the right side of the toolbar
- A new window will open
- Enter the required information:
  - **Certificate number**
  - **Service** (e.g. Principles & Criteria v3.1)
  - **Valid from / Valid to** dates
- Upload the certificate file (**PDF format**)
- Click **Save and Finish**



Note: This tab triggers Better Cotton to update the **Physical Site CoC** access for suppliers.
If this tab is left blank, suppliers will **not** receive access to the **Physical** on their BCP account.

Audit

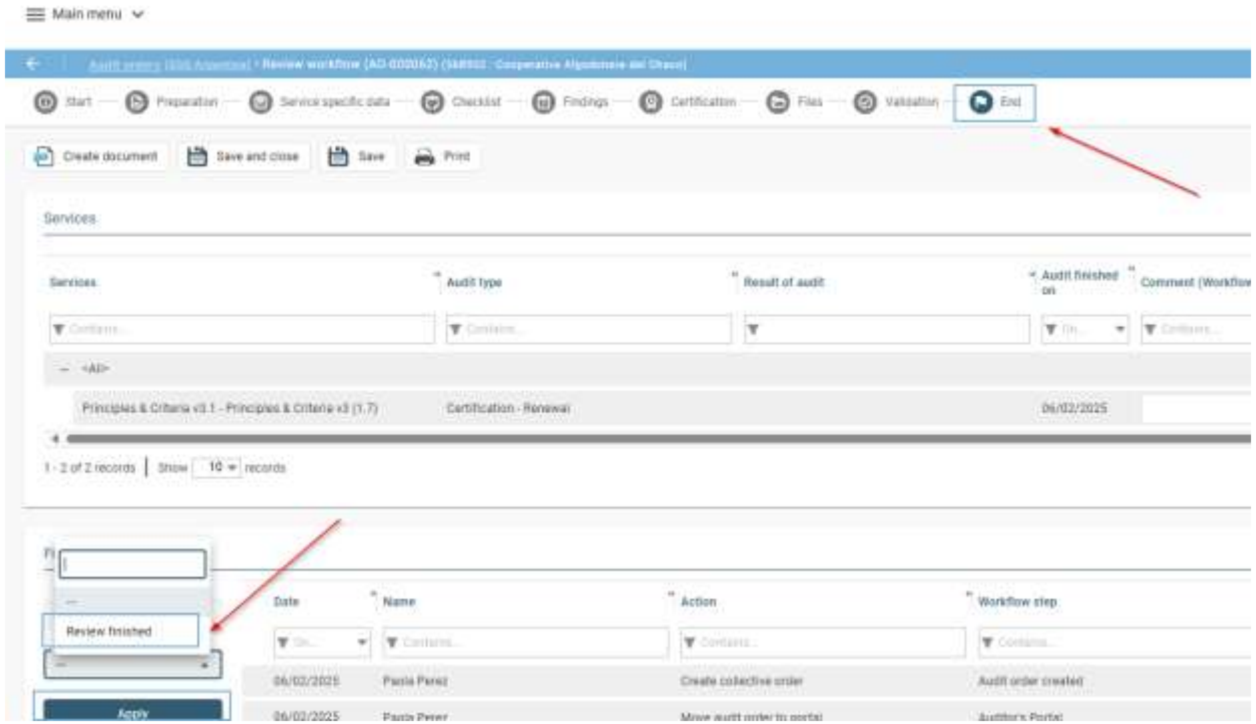
Audit Order – Finish Review

Finalizing the Review

Steps:

- Go to the **End** tab in the workflow
- Scroll down to the section labeled **Final Steps**
- From the dropdown menu, select **Review finished**
- Click the **Apply** button to complete the review

Note: This action confirms that the review is fully completed.



YOU HAVE SUCCESSFULLY COMPLETED AN AUDIT ORDER IN INTACT.

Audit

Audit Order – correcting an Audit Order

For any changes required after an audit order has been finished in INTACT, please contact compliance@bettercotton.org quoting the audit order number.

Our support team will be able to re-open the audit order for the CB Admin to correct information.

Please note:

- This should be used as a last resort; we encourage CB Admin to quality check the information completed in the audit order before moving it to the finished stage.
- The same CB Admin user must complete the updates – we cannot reallocate the audit order to a different user to update the record.

ADDITIONAL GUIDANCE

Navigation

Navigation

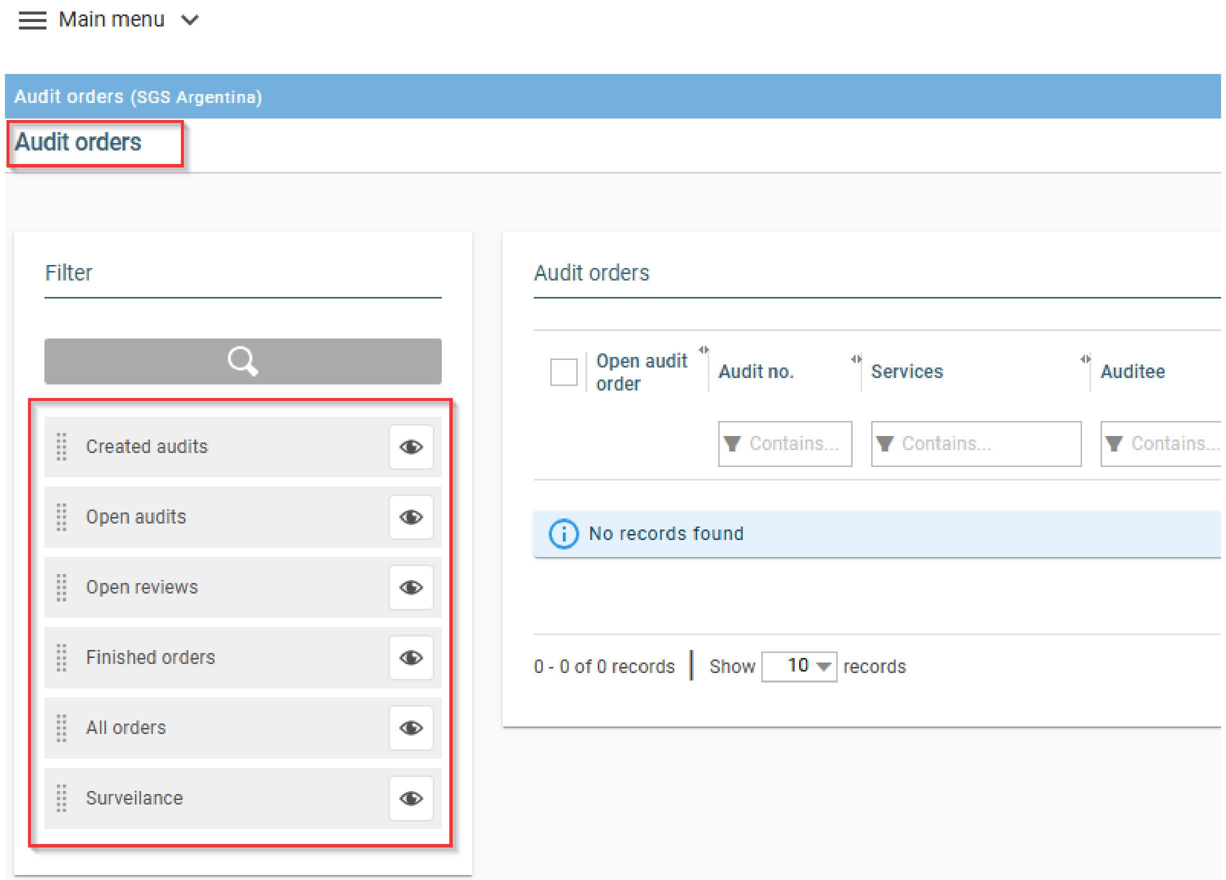
Start Screen – Audit Orders Overview

After logging in, the Audit Orders page is the first screen CB Admin will see.
It provides a quick overview of all audit-related activities you are responsible for.

Available Filter Options
Use the filters to quickly narrow down the list of audit orders:

- **Created Audits:** View audit orders that have been created but are not yet in progress.
- **Open Audits:** Shows audit orders that are in **progress** or **pending** action.
- **Open Reviews:** Displays audit orders that are now under review.
- **Finished Orders:** Lists all audit orders that are fully reviewed and finalized.
- **All Orders:** A complete list of all audit orders, regardless of their status.
- **Surveillance:** Filters for audits that are conducted as surveillance audit

Tip: Use filters regularly to stay focused on your current tasks.



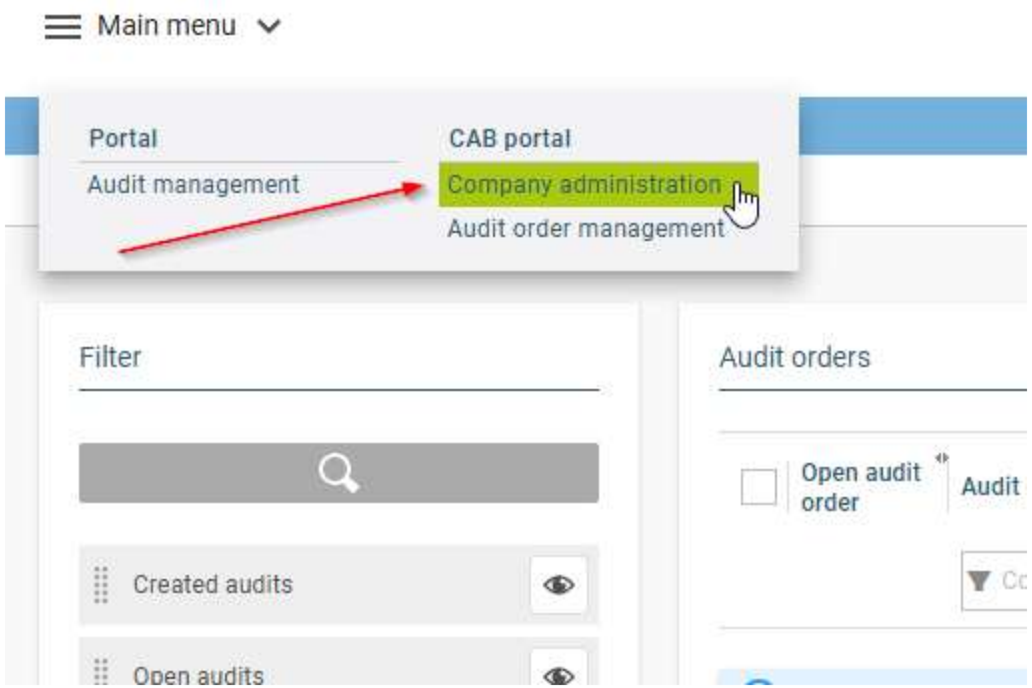
Navigation

Main menu

The Main Menu is always available in the top-left corner. It allows CB Admins users to search for auditees, such as producers or supply chain actors.

How to Navigate

- Click on the **Main Menu** (☰) in the upper left corner.
- Under the **CAB Portal** section, click on **“Company Administration"**
- This will open a page where you can search for and access records.



Note: *As a CB Admin, you will only see audits managed by your CAB.*

Navigation
Find an Auditee

This page allows CB Admins to find and access information about auditees assigned to them.

You cannot create new auditee accounts in Intact: all new auditee accounts (both Producers and Supply Chain Actors) are created by Better Cotton in Salesforce.
Once a CB is allocated in Salesforce, the data is automatically pushed to Intact, where the auditee profile is created.

Filter Options at the Top

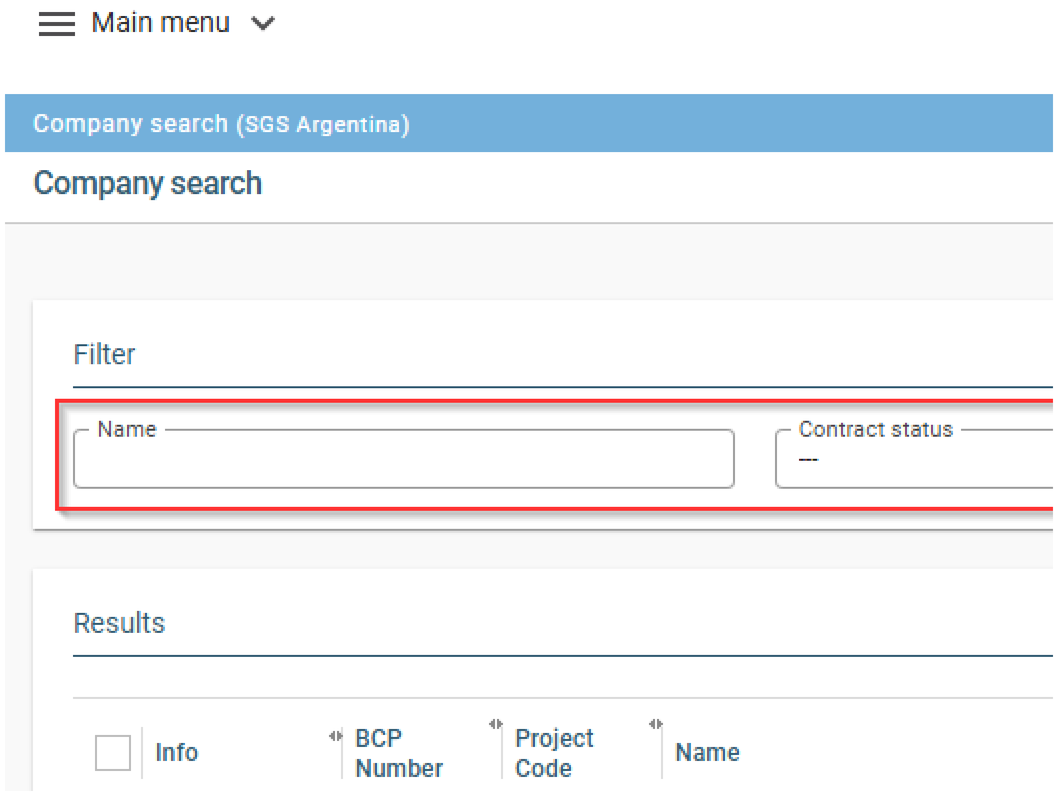
Use the filters to narrow down your search:

- **Name:** Enter the full or partial name of the company to search.
- **Classification:** Filter by classification (e.g., Auditee, Auditor, Site, etc)
- **Contract Status:** Filter by status (e.g., Active, Inactive, Applicant)
- **Service:** Select the relevant service to limit the search to applicable entities

Viewing Search Results

- The table below shows key information such as:
  - BCP number, Project Code, Name, Address, Country, Email and CAB Name
- Double-click a row to open the entity's full profile page.

Tip: Use the filter fields in the result table to refine columns individually.



Entity Data

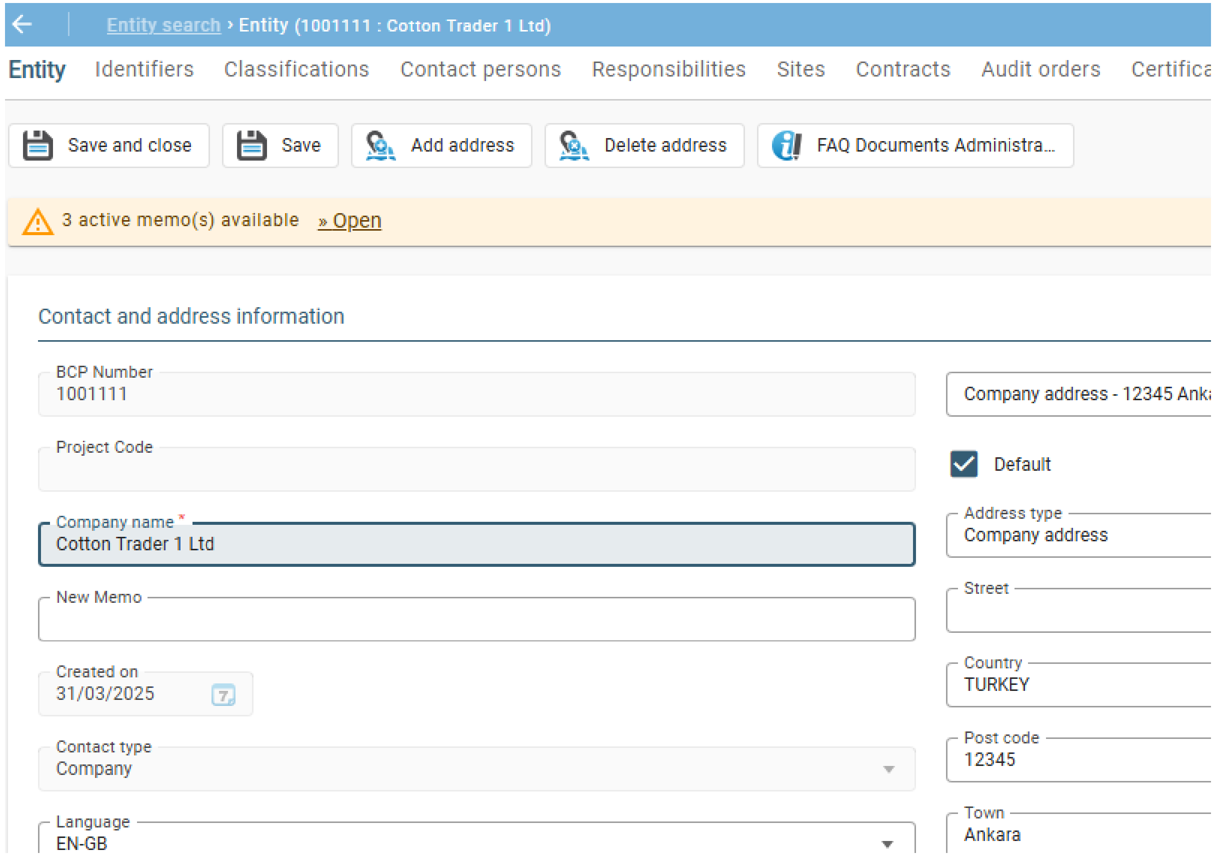
Comprehensive overview of the selected entity

Overview Tab: The Entity tab shows basic entity information, including company names, address and contact details.

This tab is useful for quickly verifying the identity of an auditee.

Additional Tabs

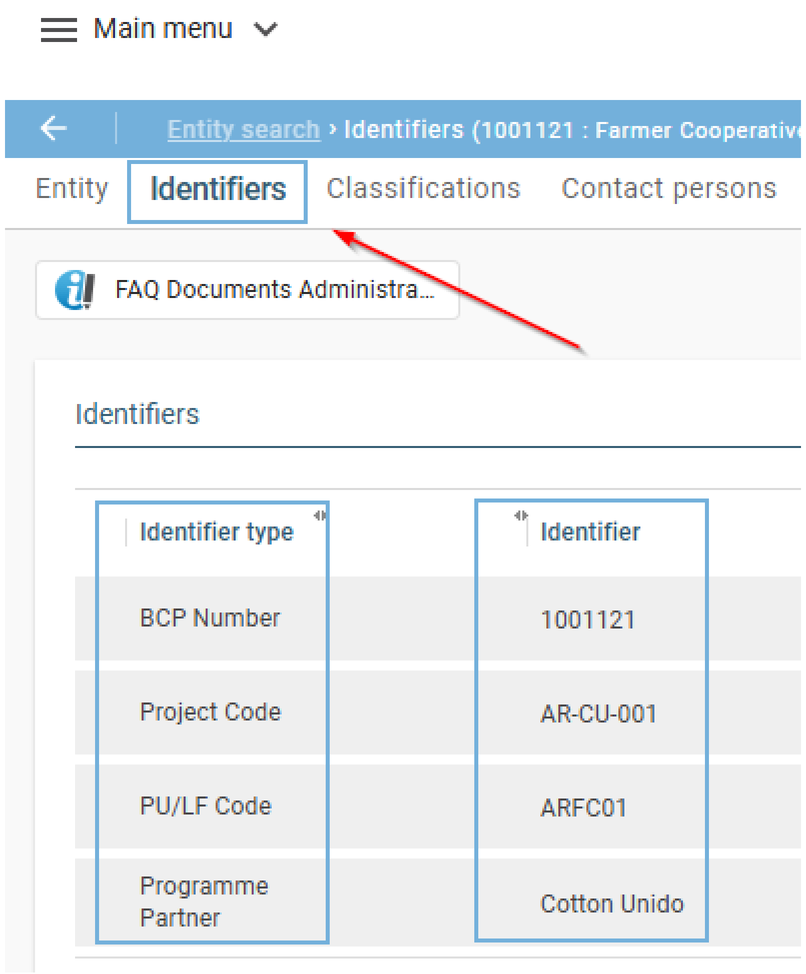
- **Identifiers:** Unique reference numbers or IDs linked to the auditee
- **Classification:** Type of the entity (e.g. Producer, Supply Chain Actor)
- **Contact Persons:** Key individuals associated with the entity
- **Sites:** Displays site or facility addresses linked to the auditee (only applicable to multisite or group certification)
- **Audit Orders:** History and status of audits conducted
- **Certification Scope:** Displays additional information relating to the scope of the last audit
- **Findings:** Non-conformities or other observations raised during audits
- **Certification:** Shows current certification status and updates
- **Certificates:** Lists issued certificates and allows download/printing.
- **Files:** Uploaded documents and attachments
- **Memos:** Used for internal communication and feedback.



Note: Due to technical limitations, tabs within the Intact Platform cannot currently be opened in separate browser tabs or windows.

Entity Data
Identifiers

The **Identifiers** tab provides an overview of key reference numbers and IDs assigned to the auditee. These values are important for traceability and consistent recordkeeping.



What you see

You see a list of identifiers with two columns:

- **Identifier Type - includes**:
  - BCP Number, Project Code, Programme Partner and PU/LF Code
- **Identifier Value:** The corresponding number or code

- **Exporting Identifiers**
- Click the **Excel export icon** (top-right corner) to download the identifier list.

Note: The BCP Number, PU Code, and Programme Partner identifiers are only applicable to Producers, not to Supply Chain Actors.

Entity Data

Classification

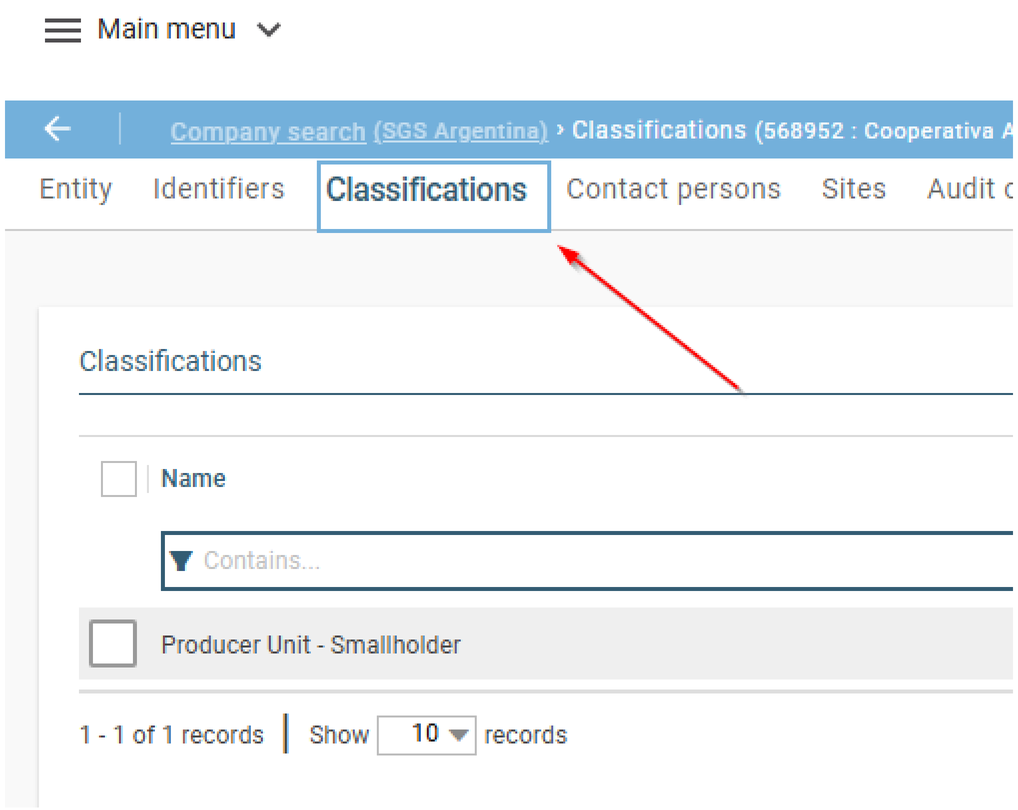
In the **Classifications** tab, the CB Admin can view the auditee's classification.

Examples of possible classifications include:

- **Producer Unit – Smallholder**
- **Producer Unit – Medium Farm**
- **Producer Unit – Large Farm**

Click the **Excel export icon** (top-right corner) to download the Classification list.

Note: Classification cannot be edited by the CB Admin – the information comes from Salesforce.



Entity Data
Contact Persons

In the Contact Persons tab, the CB Admin can view all contacts linked to the auditee. This information is provided by **Better Cotton** and reflects the official contact for the entity.

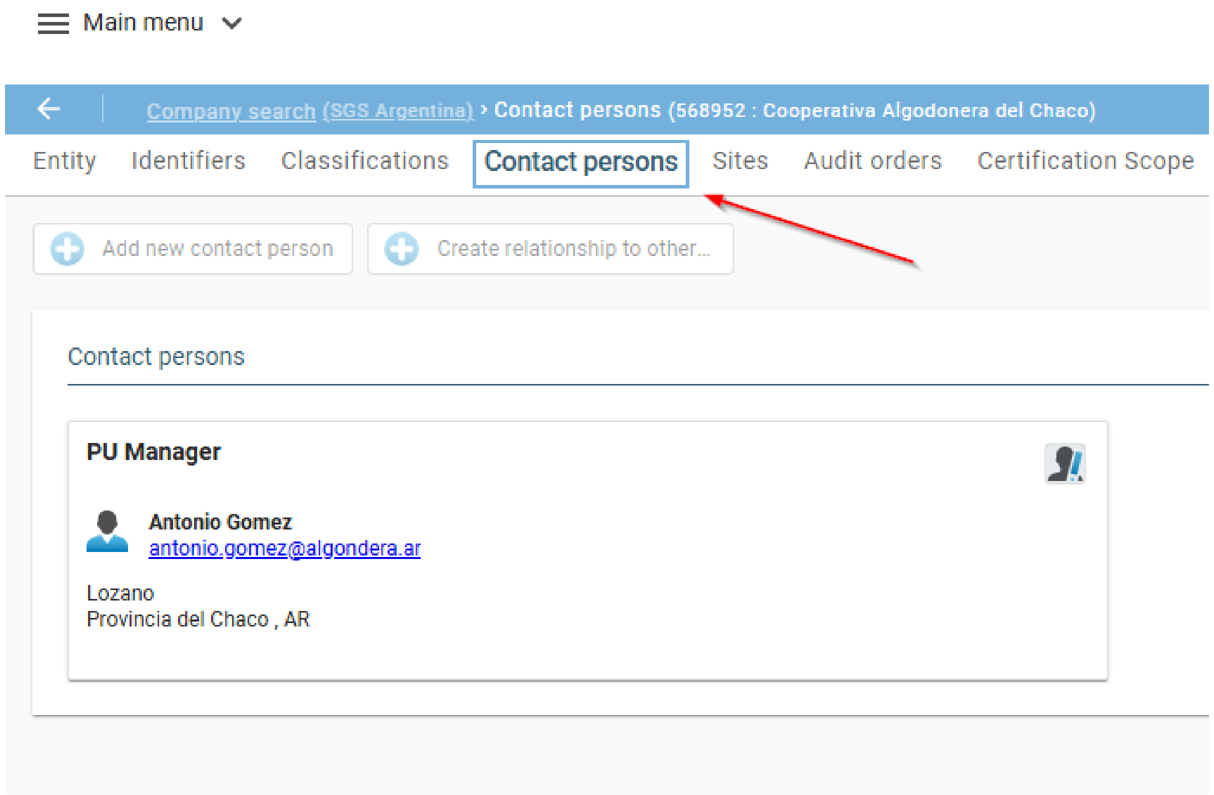
What You See

- Full name of the contact person
- Email address (clickable)
- Location details

Contact Types

- **For Producers:** the contact person is typically the PU or LF Manager
- **For Supply Chain Actors:** a default contact is provided

Quick Access: The small icon in the top-right corner of the contact card opens the Contact Entity in a new view — allowing CB Admins to view details.



Entity Data
Sites

Only applicable to Large Farm Group Certification model and Chain of Custody Multisite Certification Model.

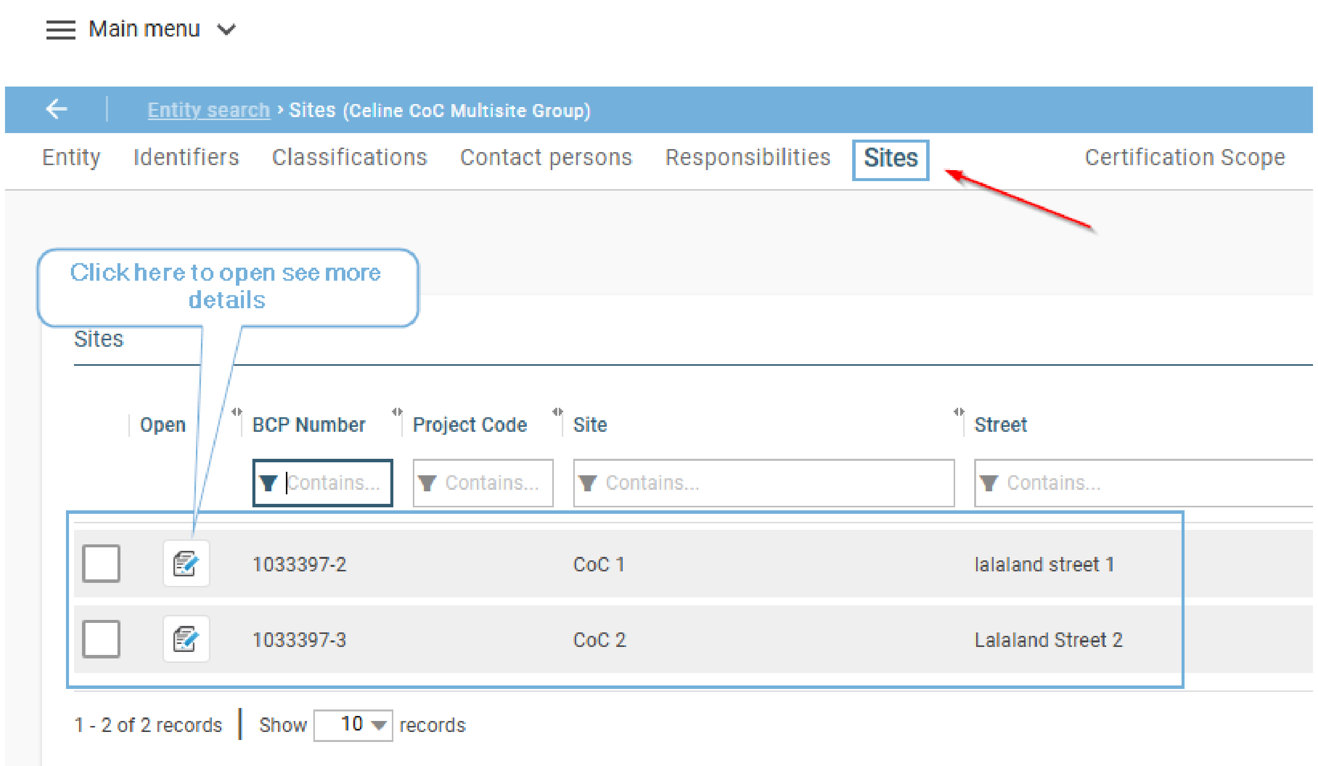
The **Sites** tab displays all site locations linked to the selected entity (e.g. Auditee or Producer sites).

Each row represents a separate site record.

Available Columns:

- **Open:** Icon to open and view more site details
- **BCP Number:** Unique site identifier
- **Project Code:** Internal project code (if applicable)
- **Site:** Name/label of the site
- **Street, Town, Postal Code:** Site address details
- **Last Audit On:** Date of the most recent audit at the site
- **Additional Info:** Any supplementary notes entered

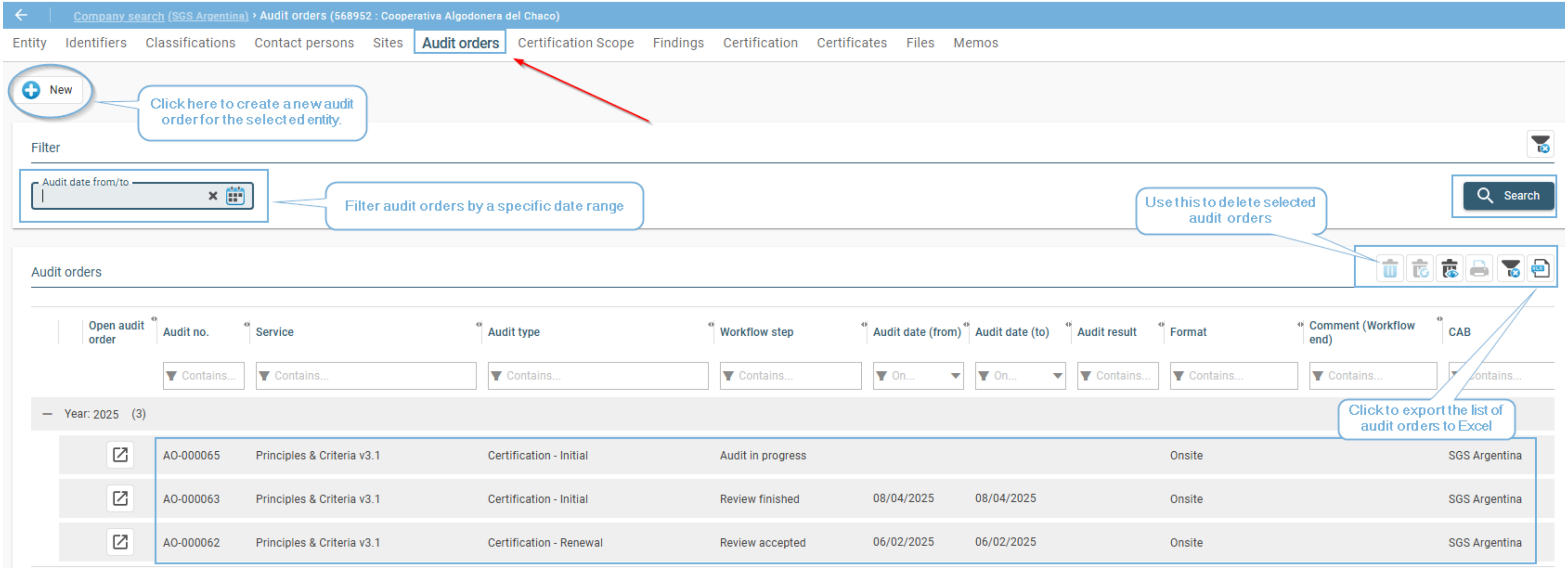
Export Function:
Use the Excel export icon in the top right to download the visible table as a spreadsheet. The columns in the export match those shown on screen.



Entity Data

Audit Orders

- The **Audit Orders** tab provides a full overview of all audits conducted or planned for the selected entity.
- This is also where CB Admins can **create a new Audit Order** by clicking the **“New”** button (top left).



Entity Data
Audit Orders

Filter Options: Use the date filter at the top to narrow the list based on a specific audit date range (from / to).

Column Descriptions

- **Open audit order:** Icon to open the audit order in a new window or tab
- **Audit no.:** Unique system-generated number for the audit order
- **Service:** The standard/version applied (e.g. Principles & Criteria v3.1)
- **Audit Type:** Indicates the type of the Audit such as initial, renewal, surveillance, etc
- **Workflow step:** Shows the current progress/status of the audit in the workflow
- **Audit date (from):** Start date of the audit
- **Audit date (to):** End date of the audit
- **Audit result:** Outcome of the audit (e.g. Compliant, Non-compliant)
- **Format:** Delivery method of the audit (e.g. Onsite, Remote, Partial)
- **Comment:** Optional comment entered at the end of the workflow
- **CAB:** The Certification Body (e.g. SGS Argentina) assigned to conduct the audit

Tip: Use filters in each column (e.g., Audit Type or Service) for faster navigation.

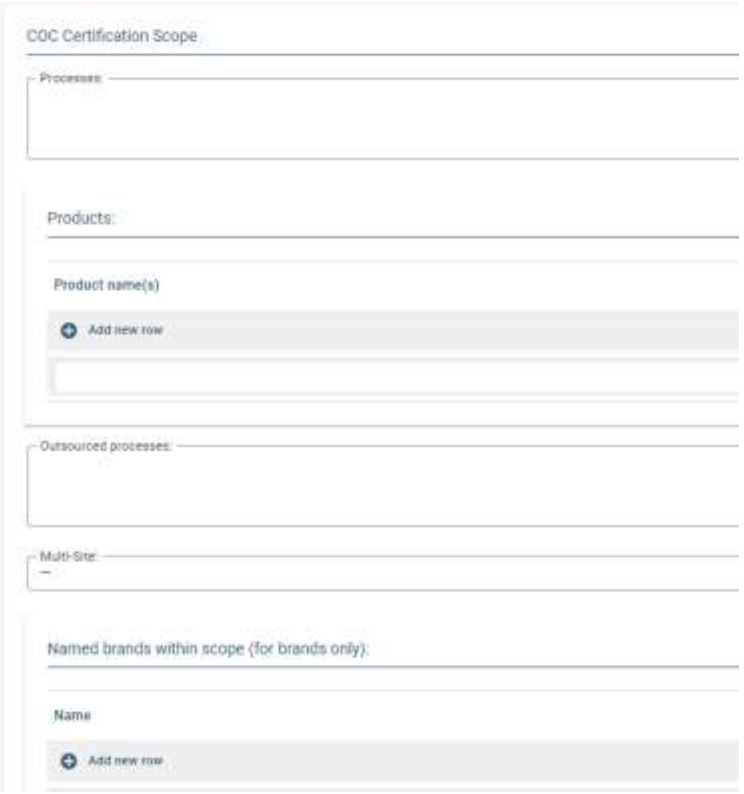
Entity Data

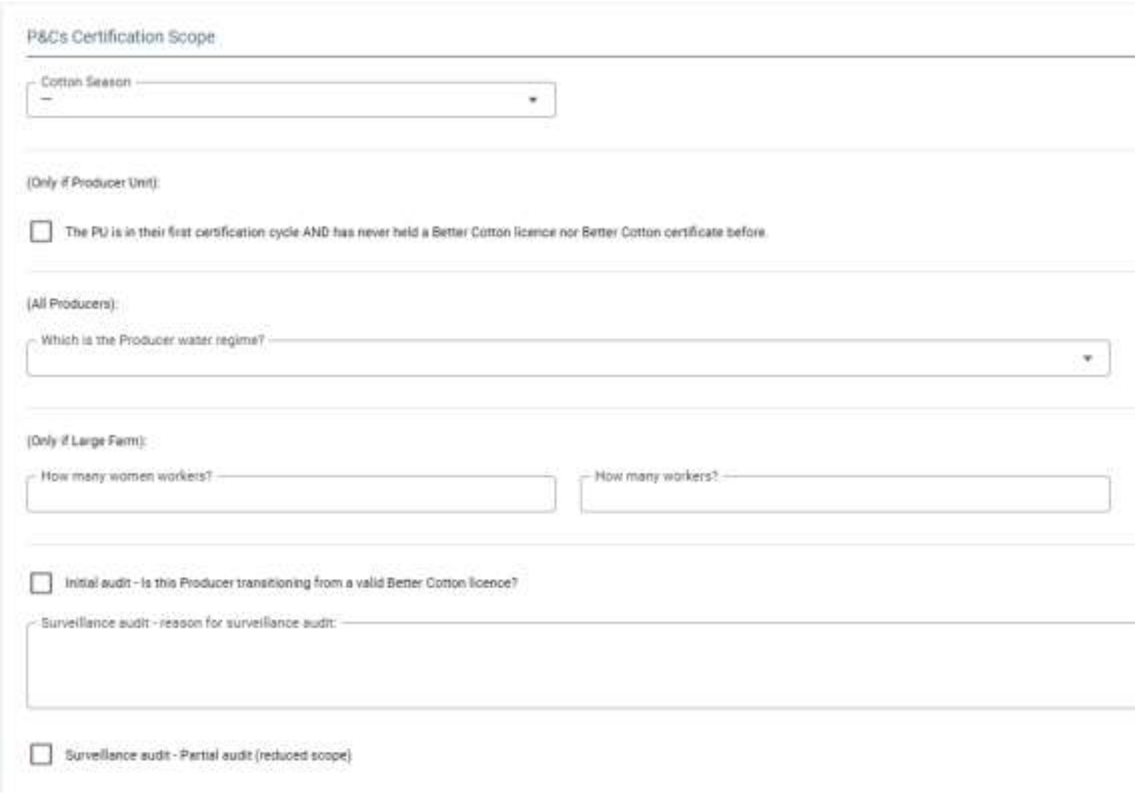
Certification Scope

The **Certification Scope** tab displays additional information relating to the scope of the last audit.

You must complete this tab at the end of each audit order to confirm all applicable information.

Please note that the tab content differs depending an Auditee (Chain of Custody or Producers)

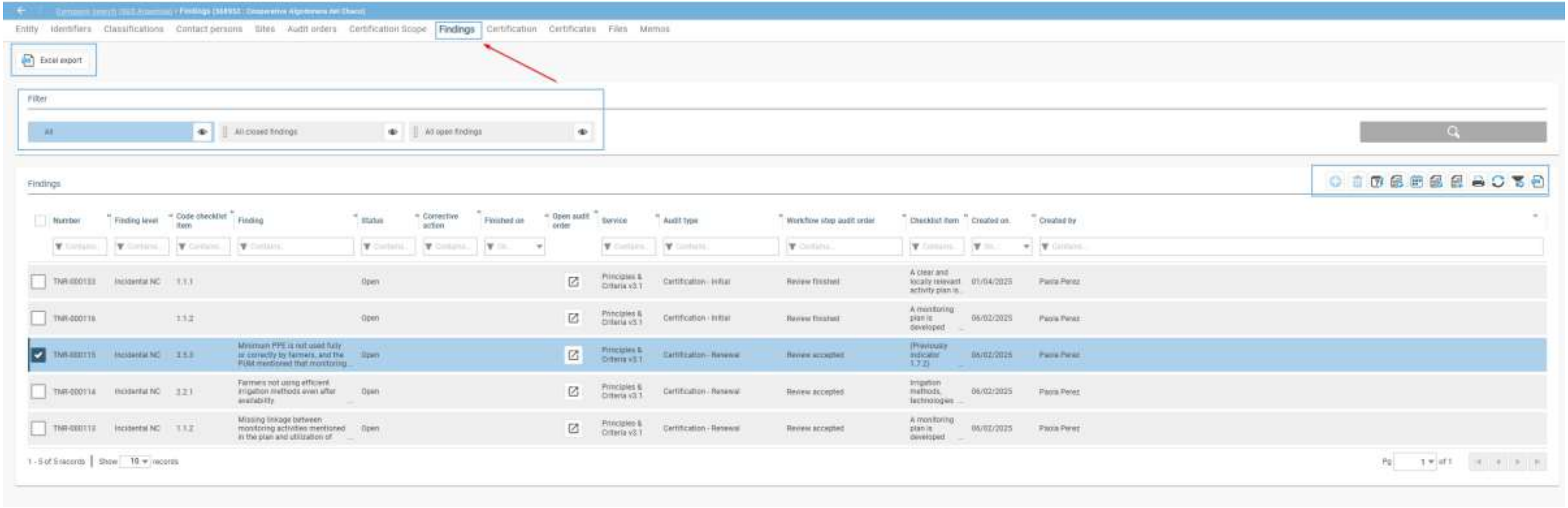




Entity Data

Findings

The **Findings** tab provides an overview of all findings raised during audits of the past years. It supports the creation and description of findings as well as the definition of timelines. CB Admins can use this tab to review non-conformities and corrective actions statuses and prepare for upcoming audits.



Entity Data

Findings

Description of the toolbar icons - from left to right, based on standard icon positioning:

- **Create new finding:** Add a new finding manually (rarely used – findings are usually created through audit workflows).
- **Delete finding:** Delete the selected finding (only available if permitted by system rules).
- **Change status:** Update the finding's status (e.g. from Open to Closed).
- **Activate/Deactivate finding:** Mark the finding as active or inactive
- **Open audit order:** Open the related audit order linked to the selected finding.
- **Generate finding report:** Create a PDF or Word report for the selected finding (for documentation or communication) Not available for now.
- **Refresh page:** Reload the list of findings to see the most current information.
- **Reset filter:** Clear all filters and display the full list of findings.
- **Export to Excel (list):**Download the full list of findings as an Excel file.

Entity Data
Findings

Finding Levels in Intact Platform

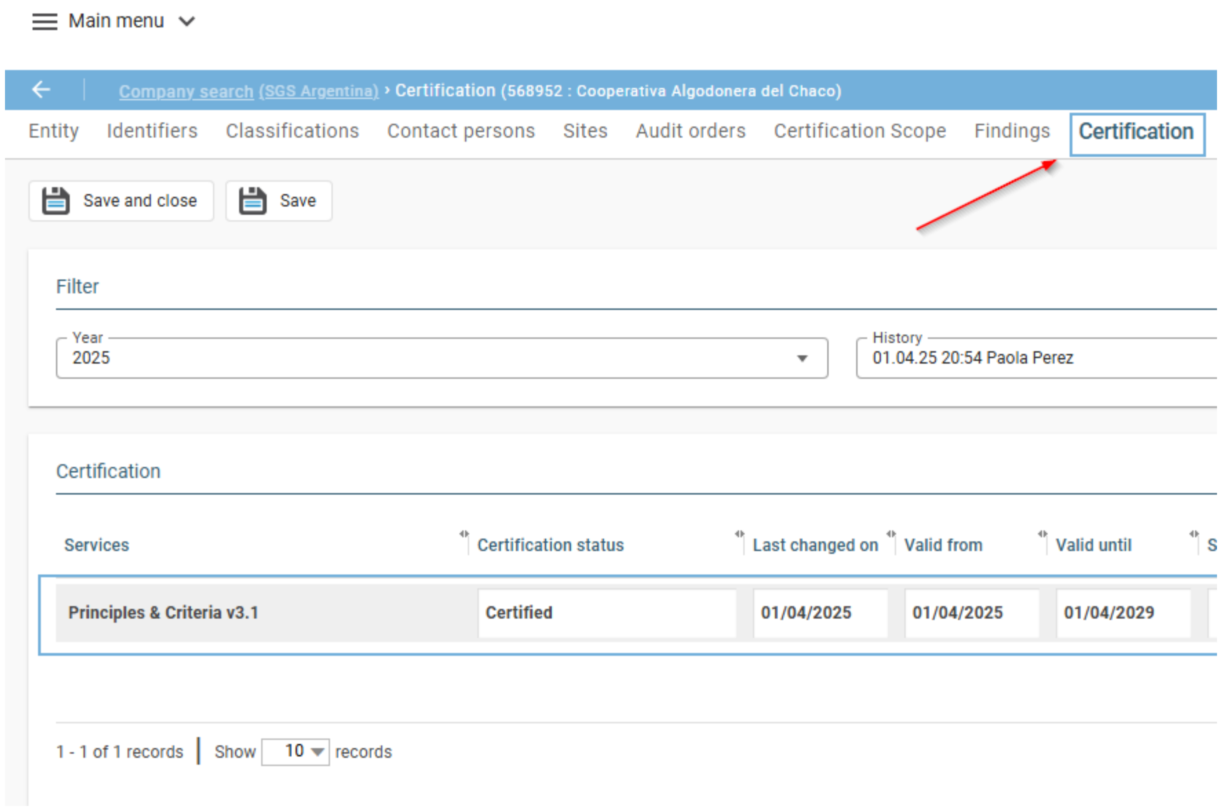
Finding Level Principles & Criteria	Finding Level Chain of Custody Standard
Observation	Minor
Incidental NC	Major
Systemic NC	Critical

For more information on process to grade findings, please refer to Better Cotton Monitoring and Certification requirements
https://bettercotton.org/what-we-do/certification/

Entity Data

Certification

The **Certification** tab provides an overview of the latest certification status for the selected entity.



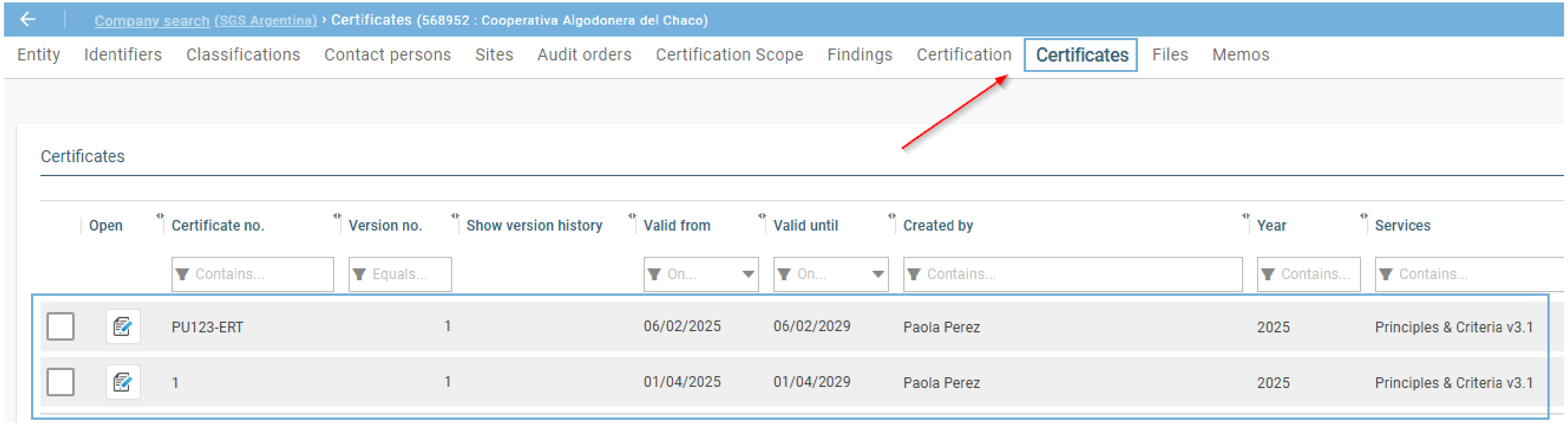
What You See

- **Service:** The standard the entity is certified for
- **Certification Status:** Current status (e.g. *Certified*, *Suspended*, *Withdrawn*)
- **Last changed on:** Date the certification status was last updated
- **Valid from / valid until:** Validity period of the certification
- **Suspended from / until:** Duration of any suspension
- **Changed by:** User who last changed the status

Entity Data

Certificates

The **Certificates** tab lists all certificates issued for the entity, along with validity details.



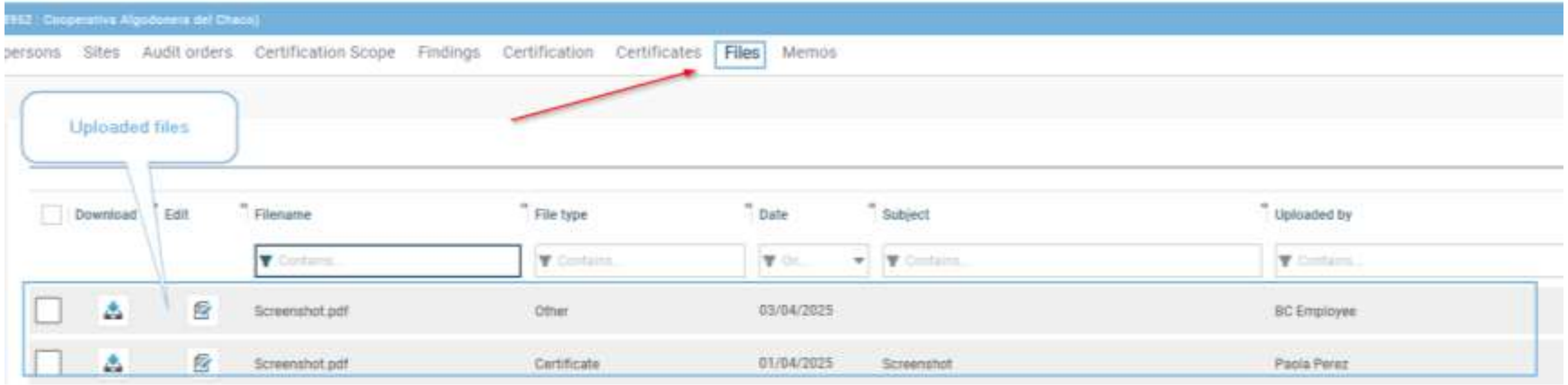
What You See

- **Certificate no.:** The assigned certificate number (e.g. *PU123-ERT*)
- **Version no.:** Version number of the certificate
- **Show version history:** View previous versions (if applicable)
- **Valid from / valid to:** Dates of validity for each certificate
- **Created by:** User who issued or uploaded the certificate
- **Year:** Certification year
- **Service:** Standard under which the certificate was issued

Entity Data

Files

The **Files** tab displays all documents that have been uploaded* for the selected auditee



What You See

- **Filename:** Name of the uploaded file
- **File Type:** Type/category of the document
- **Date:** Date the file was uploaded
- **Subject:** Title entered during upload
- **Uploaded by:** Person who uploaded the file

Key Functions

- **Add file:** Click add a new files
- **Edit:** Click to edit selected file(s)
- **Download:** Click to download selected files
- **Delete:** Click to delete selected files
- **Export:** Export list of files

**Files up to 100 MB in PDF, Excel, Word, or JPEG format can be uploaded; ZIP files are only allowed for bulk evidence, but must not be used for audit reports or certificates, which must be uploaded individually*

Entity Data

Files

Available File Types in Intact Platform

File Type	Description
Audit Report	Final report of the conducted audit
Certificate	Official certificate document
Corrective Action Plan (CAP)	Plan submitted to address identified non-conformities
Farmers List	List of registered farmers
Finding Document	Document detailing audit findings and evidence
Land Conversion Self-Declaration	Statement confirming land use compliance
Licensing / Surveillance Assessment Report	Evaluation report used during licensing or surveillance phases
Producer Readiness Check Report	Assessment report for producer readiness before certification
PU Support Visit Report	Summary of findings and observations from a support visit
RIR Document	Risk Identification Report - used for internal or external review
Self-Assessment Document	Producer’s own evaluation against applicable standards
Signed Trade Mark Sub License Agreement	Agreement signed between the Certification Body and the auditee
Statement of Permission to Trade	Formal approval allowing certified entities to trade
Suspension	Notification document indicating suspension of certification
Other	Any document not covered by predefined categories

Entity Data

Memos

Memos are covered in this slide Preparation – Memos

Document Naming Convention (P&Cs)

Files	File naming convention	Example
Audit report	• Country code_audit/surveillance audit_PU/LF code_Organisation conducting visit_season of assessment	• IN_audit_INTL18_imentor_2025-26
CAP	• Country code_PU/LF code_CAP_season_date[yyyy/mm/dd]	• IN_INTL18_CAP_2022-23_20221208
Any other supporting documents can be filed under ‘Supporting documents’		

For any questions or support, please reach out to:

compliance@bettercotton.org

All requests are triaged via Zendesk. When required, technical/admin issues will be escalated to Intact.

We also encourage you to attend one of our Live Q&A sessions: see planned sessions list in the training material folder.

Contact