INTACT Platform Manual V1.3

Target Group: CB Admin

Wednesday, 01 April 2026

Updates

Version 1.3 of the manual published in April 2026 includes the following changes:

Category	Process change
Some slides have been broken down into several slides to help navigating the information (e.g. when variations between approach for CoC audits and P&Cs audits).	No
Updated slides titles to reflect process steps, rather than INTACT terminology.	No
Now only recommending 1 approach to creating Audit Order (via Company administration menu) instead of previously advertised 2 options Added specific timeline for the CB to create an Audit Order	Partial
Added specific timeline for the CB to complete and finalise an Audit Order	Partial
Improved guidance on completing checklist	No
Added a checklist of all data points and files for P&Cs and CoC audits	No
Improved guidance on appeal	Yes
Updated files types list (added guidance on applicability for CoC Vs P&Cs audits)	No

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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 Initiative (BCI) regarding audit-related concerns such as identified risks, audit shadowing requests or feedback on submitted reports.

- **Notifying Better Cotton of Scheduled Audits:** Inform BCI when an audit has been scheduled by creating an Audit Order - in line with required timelines.

- **Submitting Audit Data and Documentation:** Upload and share all relevant audit data and supporting documents as per BCI's requirements.
- **Updating Certification Status:** Provide updates on Corrective Action Plans (CAPs), certification decisions, and any changes to certification status (e.g., suspension, withdrawal).

Glossary

- **CAB (Conformity Assessment Body)** Also referred to as Certification Body (CB) by Better Cotton Initiative. CABs are responsible for carrying out audits and issuing certificates.
- **BCI** Better Cotton Initiative
- **Auditee** A Producer or Supply Chain Actor being audited or assessed for BCI 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.

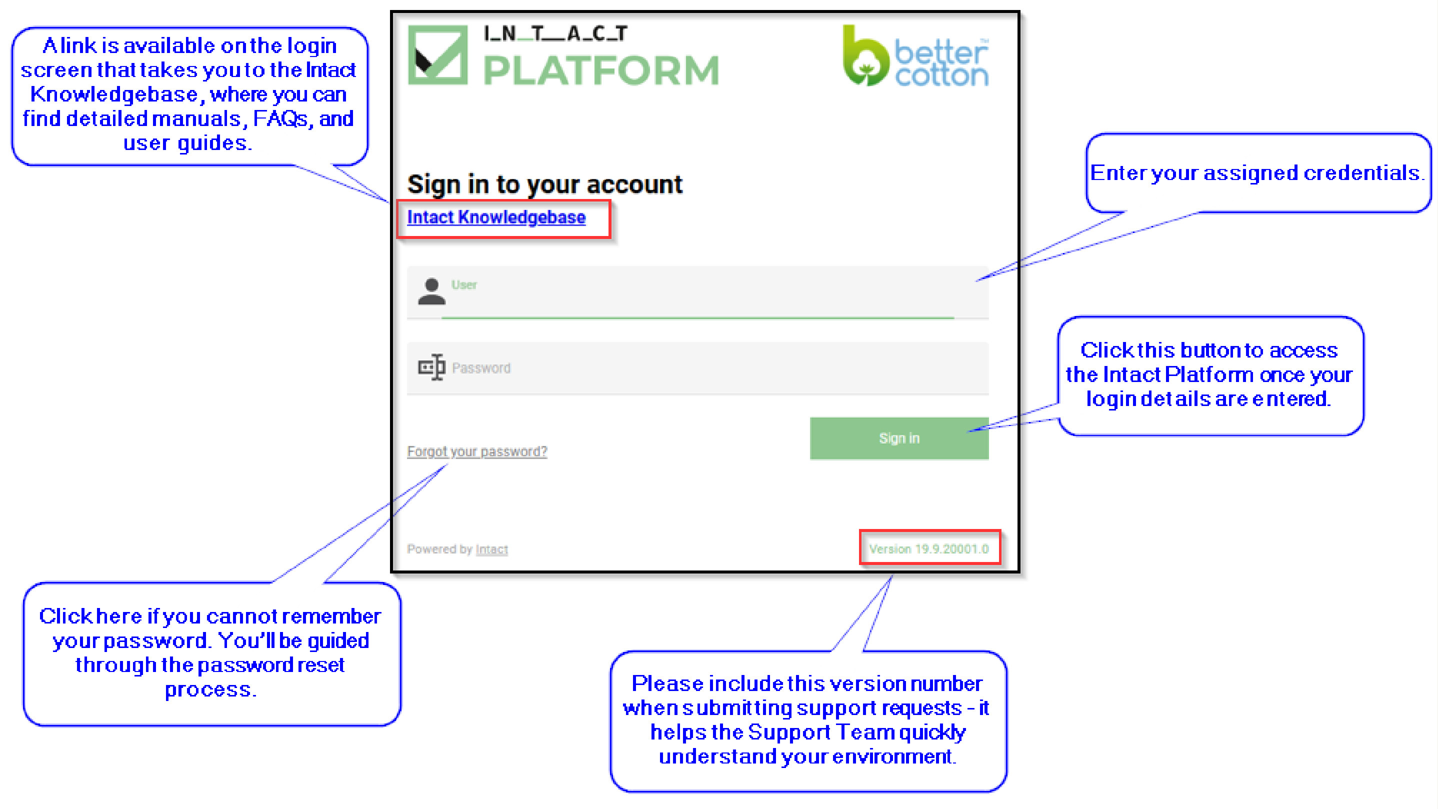
Login to the INTACT Platform

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



Reset your password

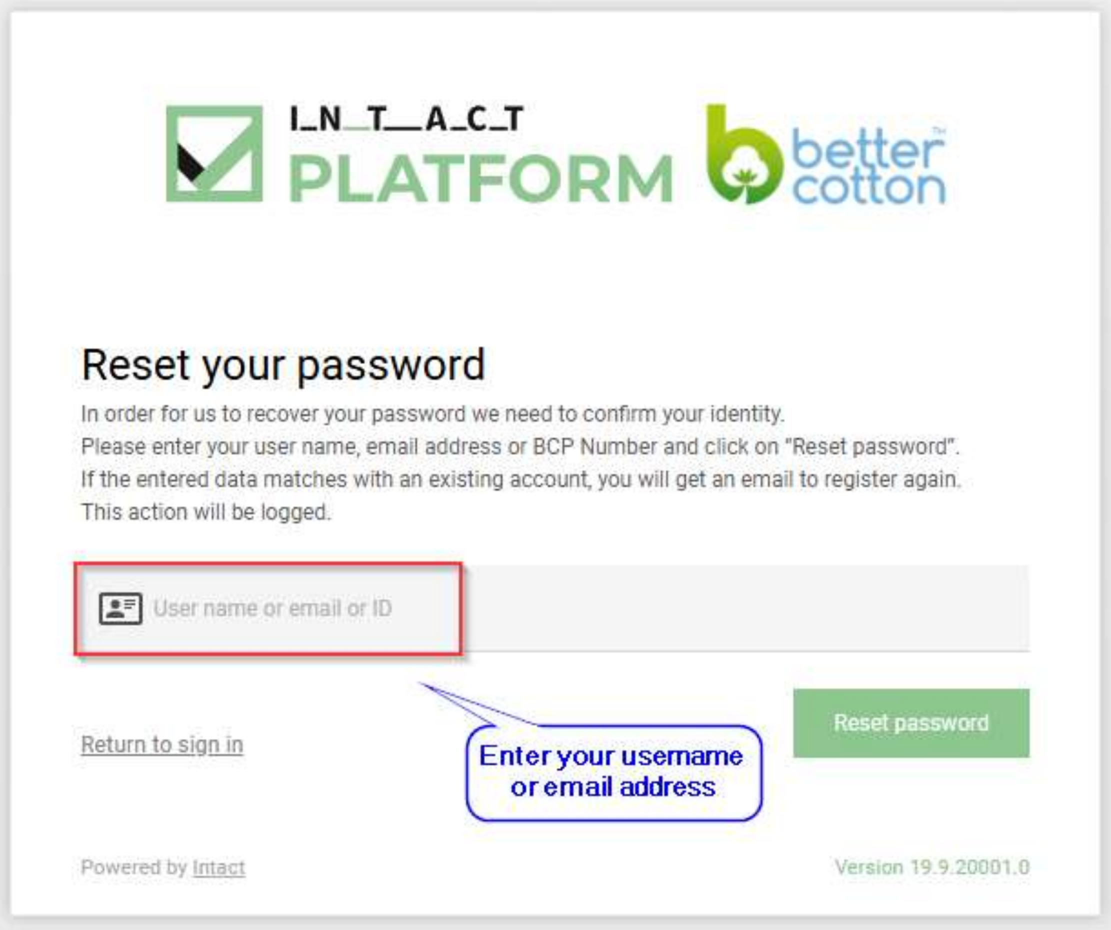
If you can't log in because you forgot your password, follow these steps to reset it securely.

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:
    - Username
    - 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



Before the Audit

Auditee allocation to Certification Bodies

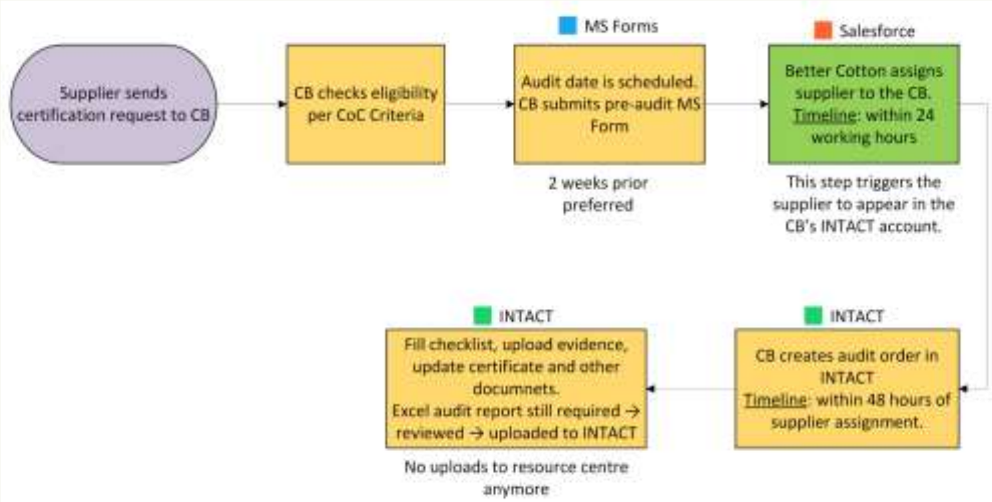
In order for a Certification Body to access a CoC supply chain actor or Producer profile in INTACT, BCI must first link these accounts in its CRM system (Salesforce).

For Producers

- **Audit Scheduling** still follows the current producer allocation process with Better Cotton Assurance 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 BCI CRM system Salesforce.
- Within 1 hour, the **data is refreshed** in INTACT.
- **Audit Order Creation in INTACT**
  CB admin must create the audit order no later than 1 month before the audit takes place (as part of audit planning).

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.
- Within 1 hour, the **data is refreshed** in INTACT.
- **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.



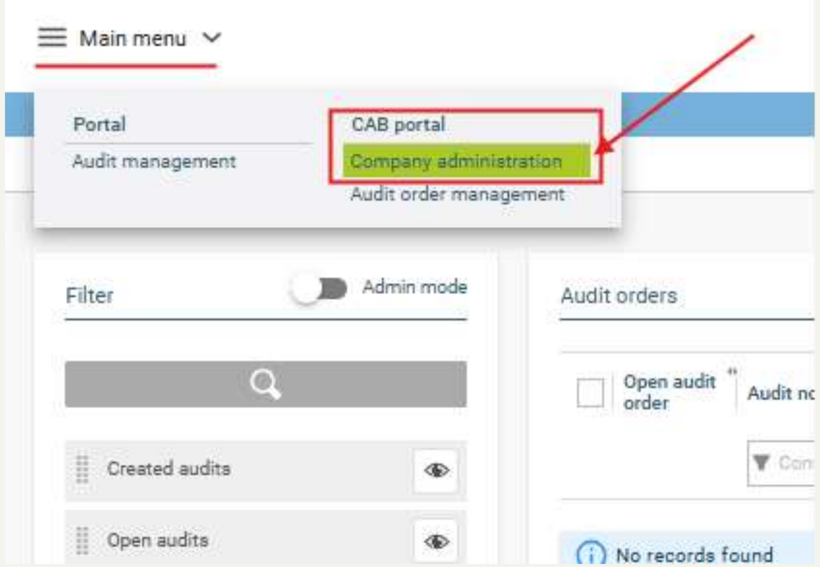
Find an Auditee to create an Audit Order

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

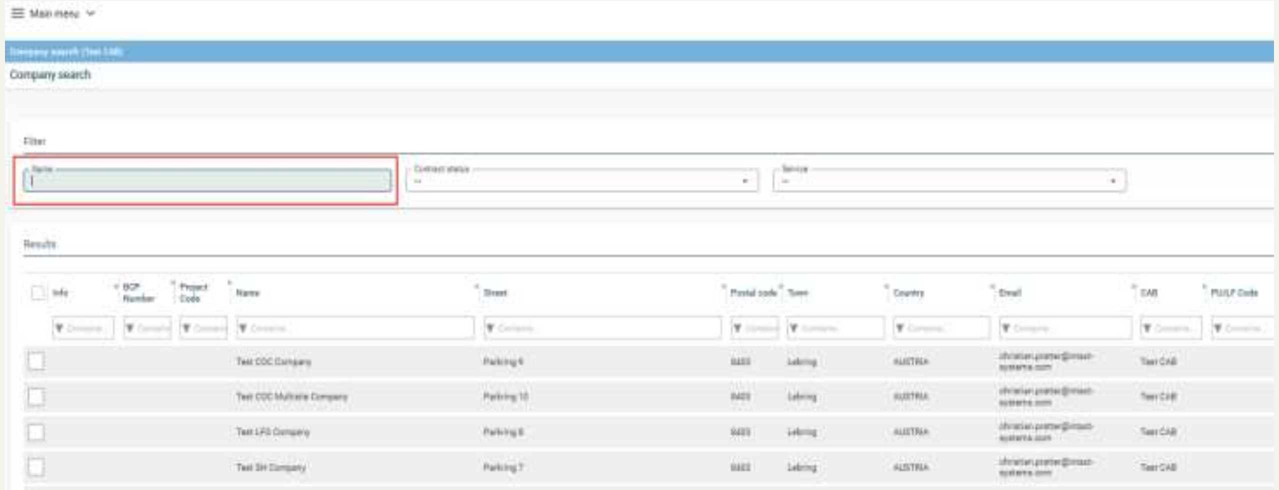
You cannot create new auditee accounts in INTACT: all new auditee accounts (both Producers and Supply Chain Actors) are created by Better Cotton in Salesforce.
Once a CB is allocated in Salesforce, the data is automatically pushed to Intact, where the auditee profile is created.

Open the Main Menu (☰)

Under CAB Portal, click on Company administration



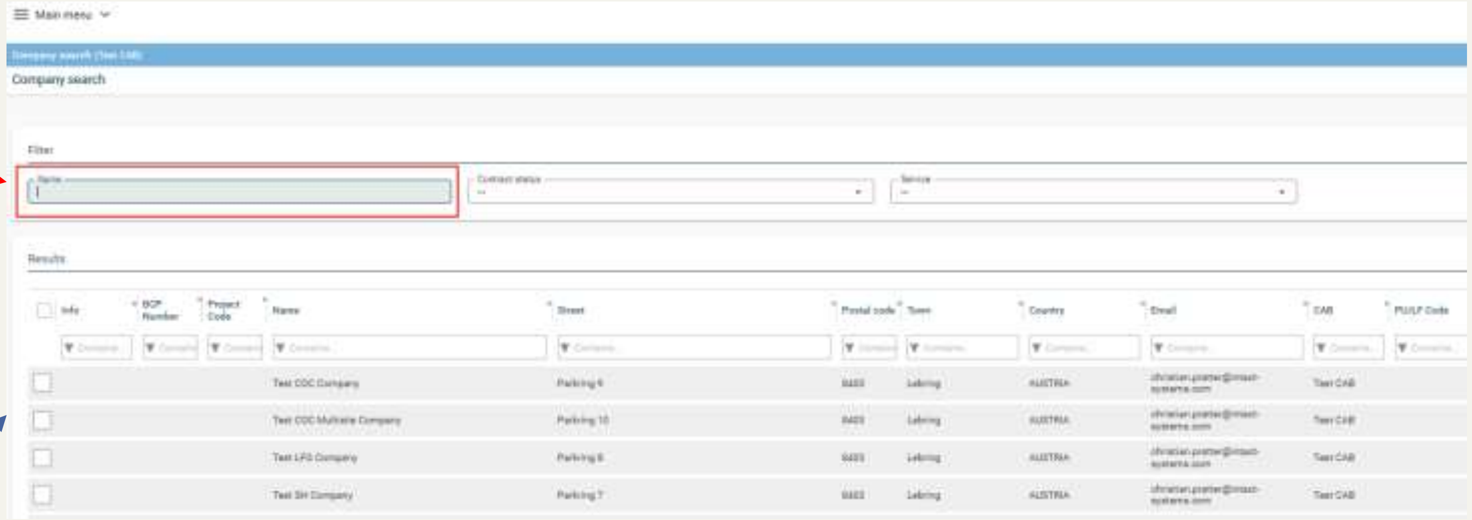
The Company administration displays all Producers and Supply Chain Actors your CAB is responsible for.



Search options

Fastest option: in the Name field, search for the auditee typing either:

- Their name (full or partial name)
- Their BCP or BCI number (depending on certification model)



Search Results are displayed in a table below showing key information such as:

- BCP number, Project Code, Name, Address, Country, Email and CAB Name

In the Results table, click a row to open the Auditee full profile page.

Tip: If multiple results, use the Filter fields to refine your search:

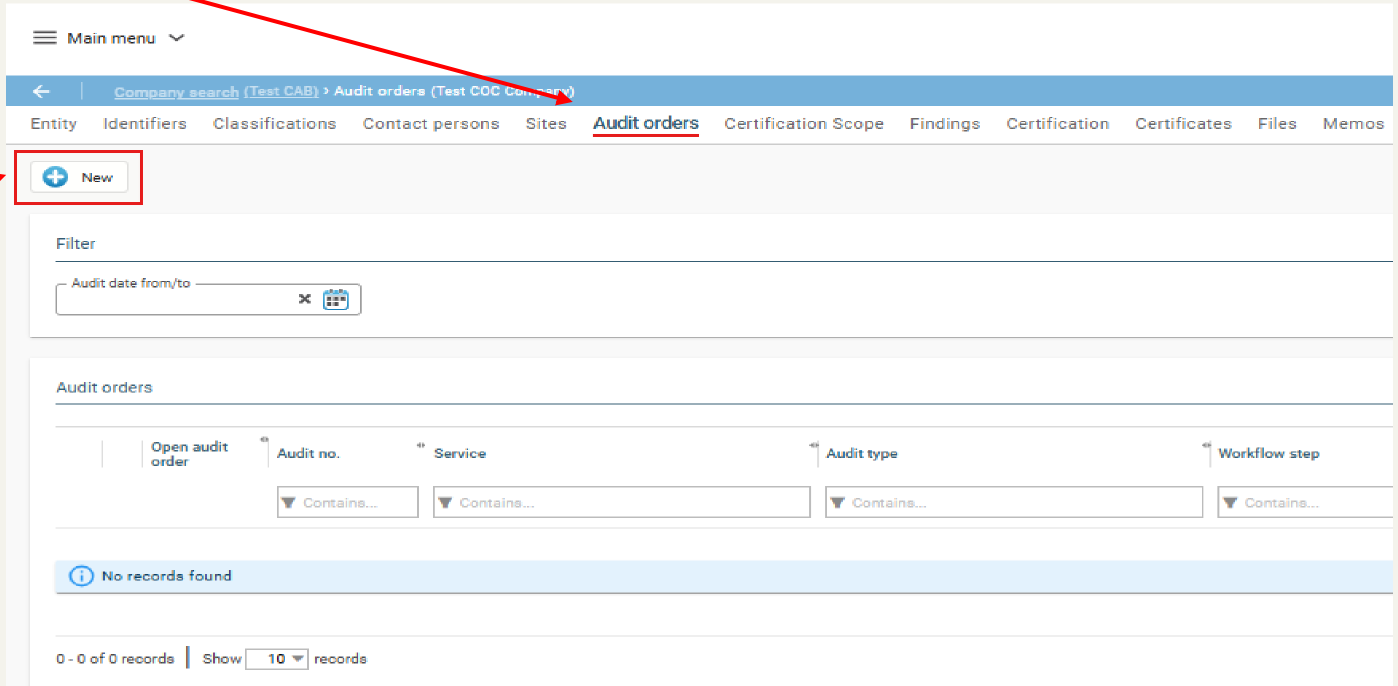
- **Contract Status:** Filter by status (Active)
- **Service:** Select the relevant standard (Principles & Criteria or Chain of Custody)

Create an Audit Order

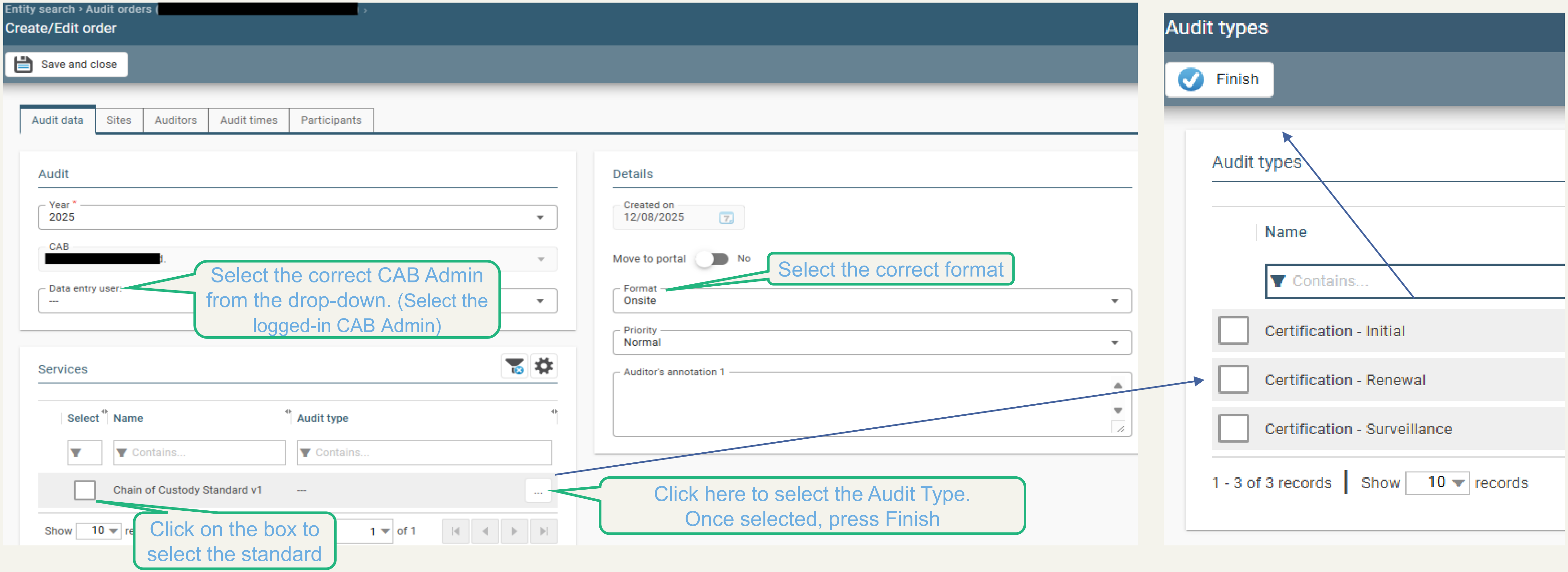
Once on the auditee profile page, navigate to the **Audit Orders** tab.

Click on **+ New** to create a new Audit Order.

The same process should also be followed when creating Audit Orders for **Initial**, **Surveillance** and **Re-certification** audits.



Complete Audit Order details

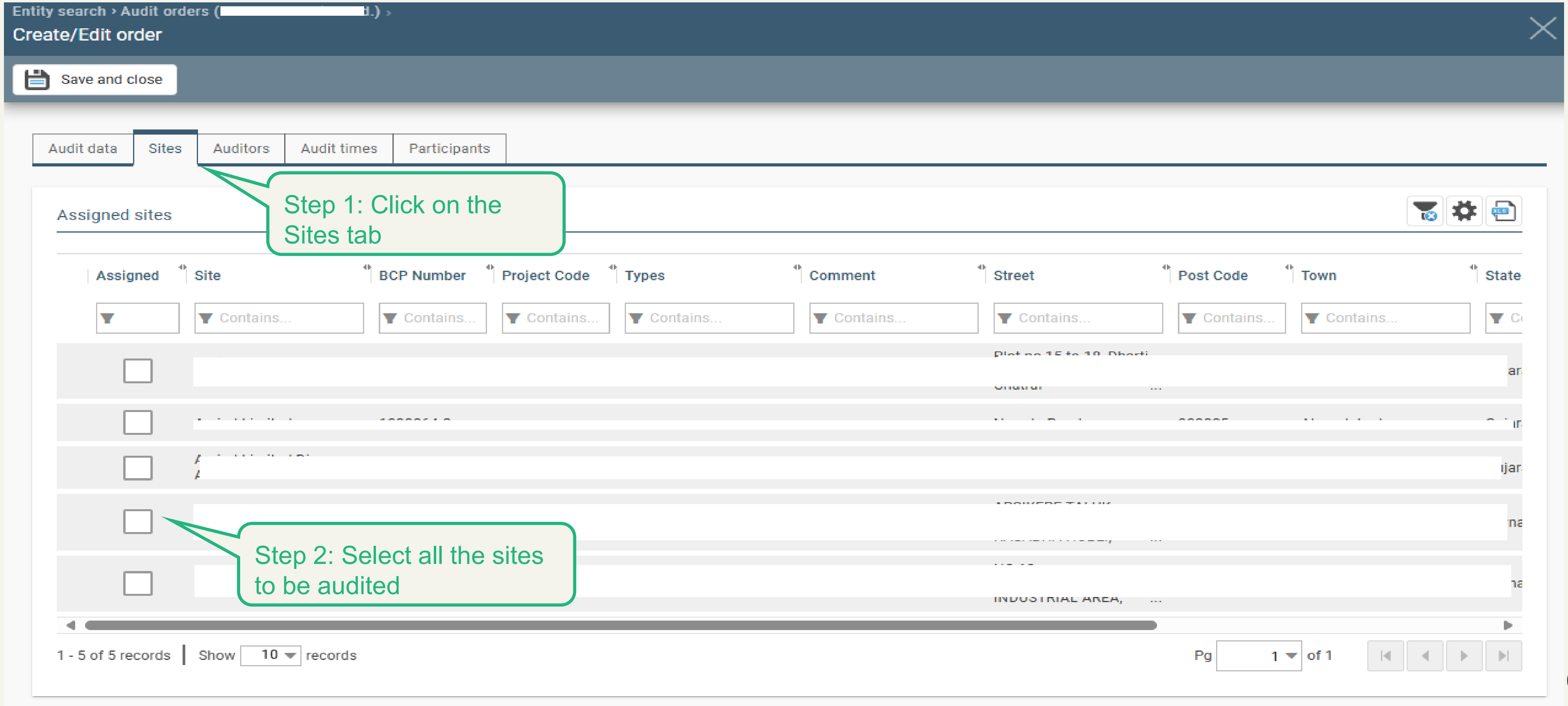


- Select the appropriate **CAB Admin** from the **"Data entry user"** dropdown list. Warning: if you create the audit order you must select your name as Data Entry User. You cannot allocate the audit order to another user. This is purely for administrative purposes, it does not imply that you have conducted the audit.
- 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.

Assign Sites

Only applicable to Chain of Custody Multisite Certification Model

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

Better Cotton has developed guidance to guide certification bodies on the addition of sites to a multisite certificate: Guidance Document for Certification Bodies on Handling Multisite CoC Cases on Intact V1.pdf

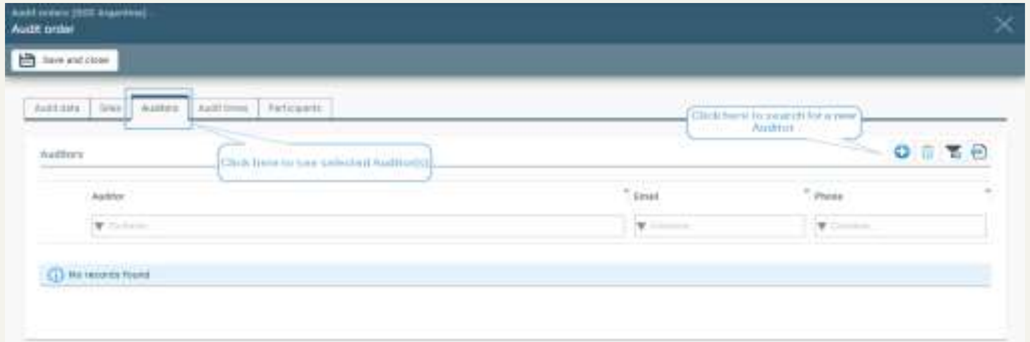
Assign Lead Auditor to an Audit

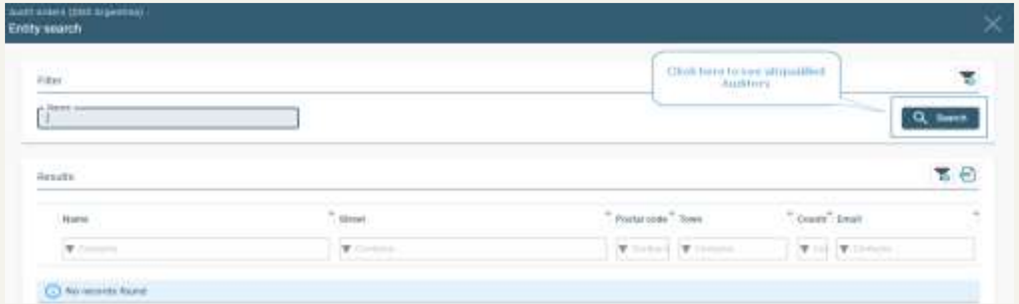
In the **Auditors** tab of the Audit Order, the CB Admin can assign one or more auditors to the audit.

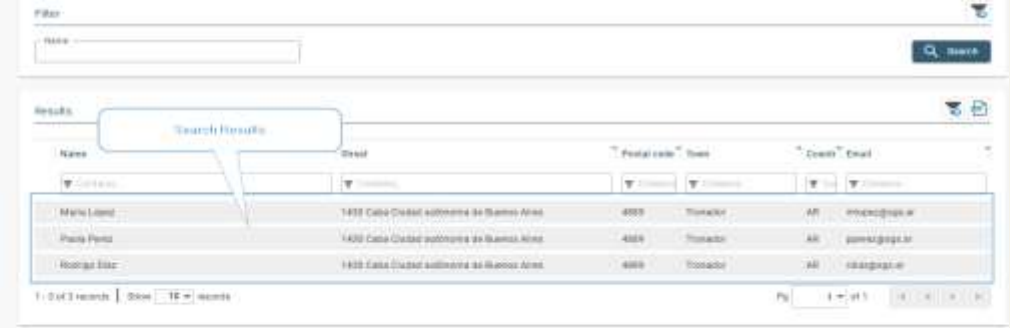
- Go to the Auditors tab in the audit order window
- Click the plus icon (+) in the toolbar
- A search page will open - click Search to see a list of auditors linked to your CAB
- Select the Lead Auditor from the list
- Click Save and close to confirm your selection

Important Note

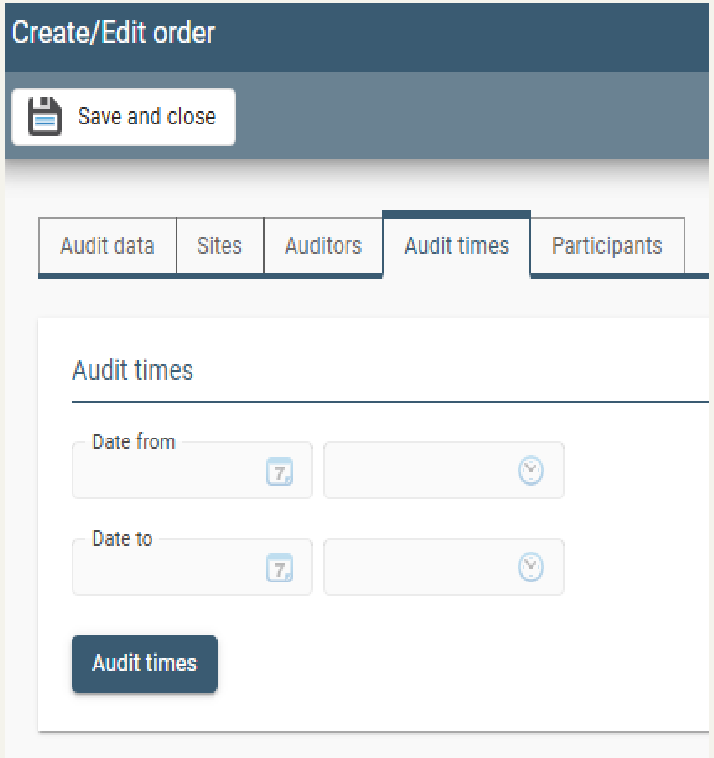
- To add Supporting auditors see slide [Add Audit Team Participants]
- Only auditors **you have declared to BCI** for your CAB will be shown in the list.
- If an auditor name does not appear, please reach out to compliance@bettercotton.org
- It is the CAB responsibility to ensure the auditors selected are qualified to perform the audit as Lead or Support auditors.

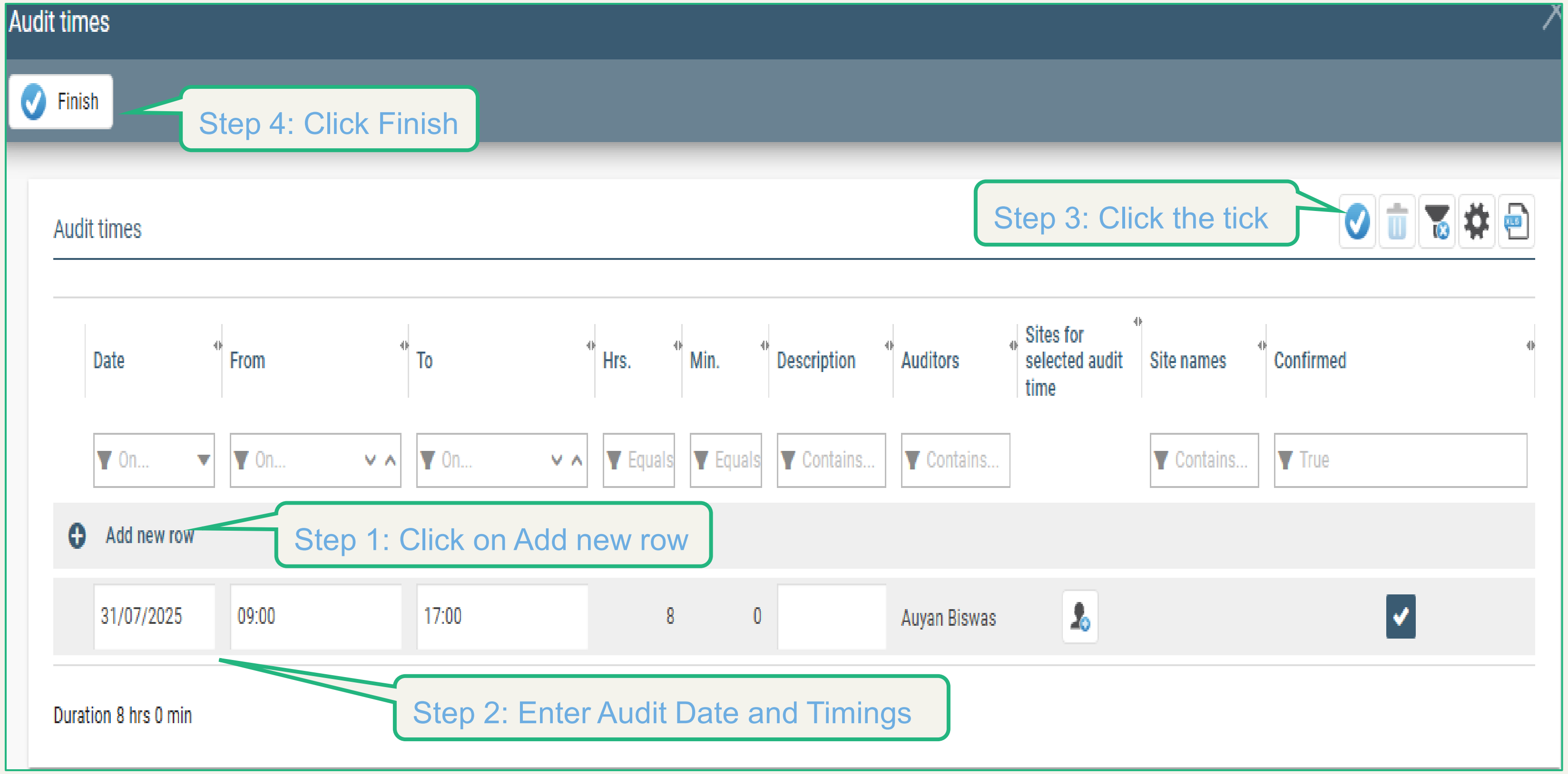






Declare Audit Times





In the Audit times tab, enter the audit dates and times:

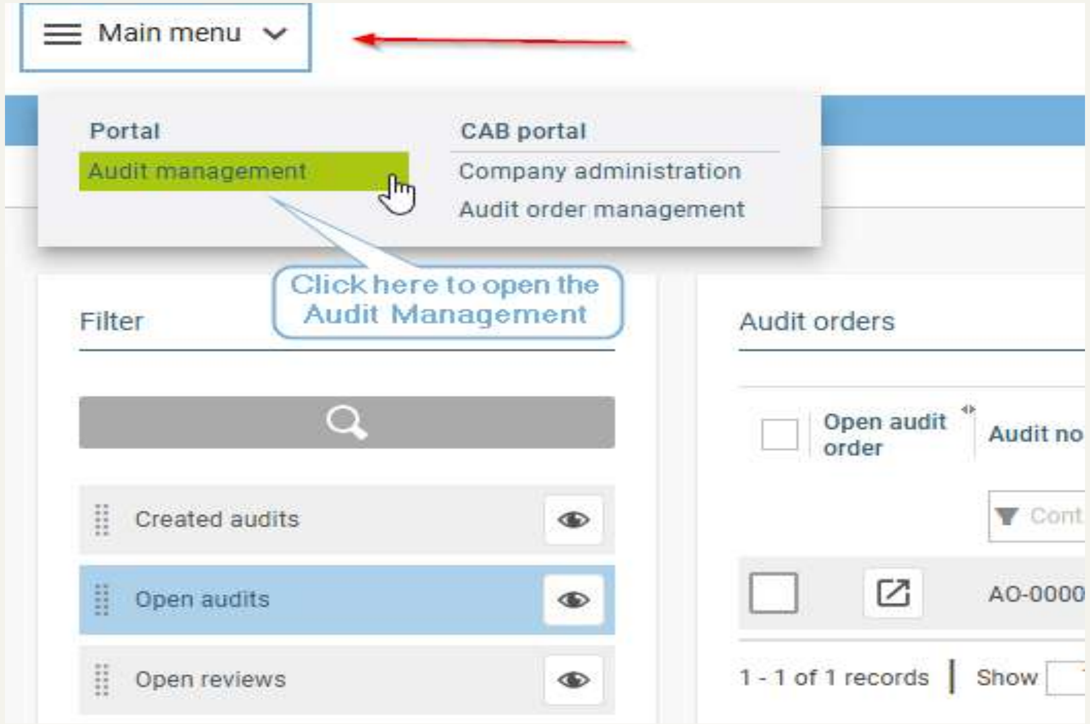
1. Go to the Audit Times tab.
2. Click on *Audit Times* - a new window will pop up.
3. Click *Add New Row*.
4. Enter the audit date and timings.
5. If the audit spans multiple days, click *Add New Row* again and enter additional dates and timings.
6. Click the ✓ (tick) to save.
7. Click *Finish* to complete

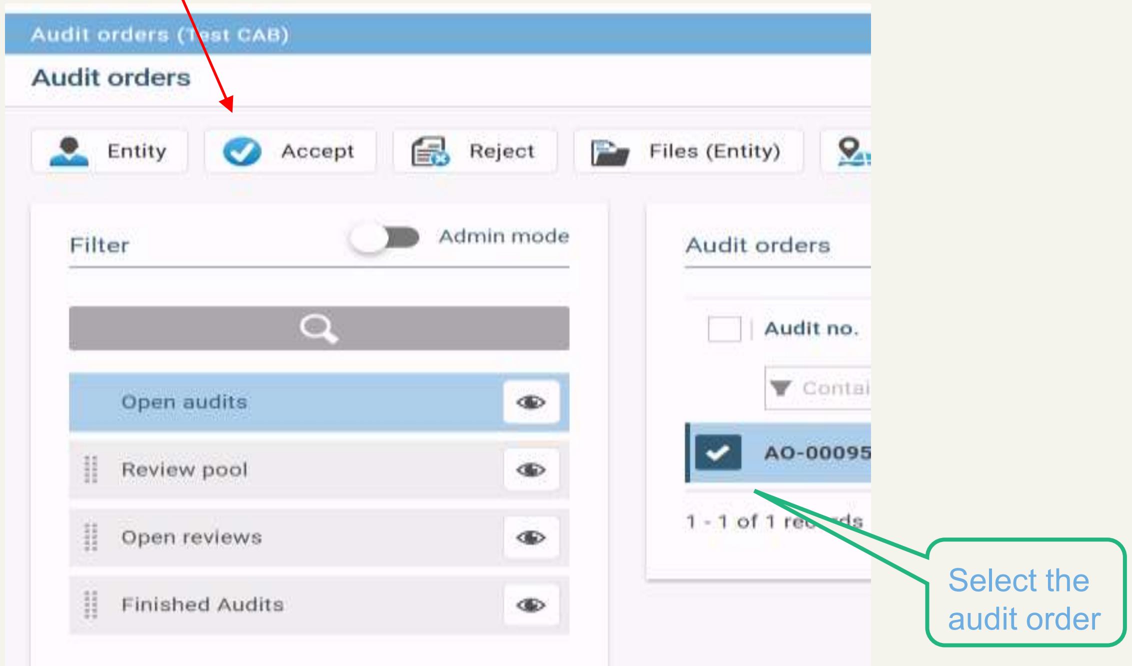
Click on "**Save and Close"**

Accept Audit Order

- 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.





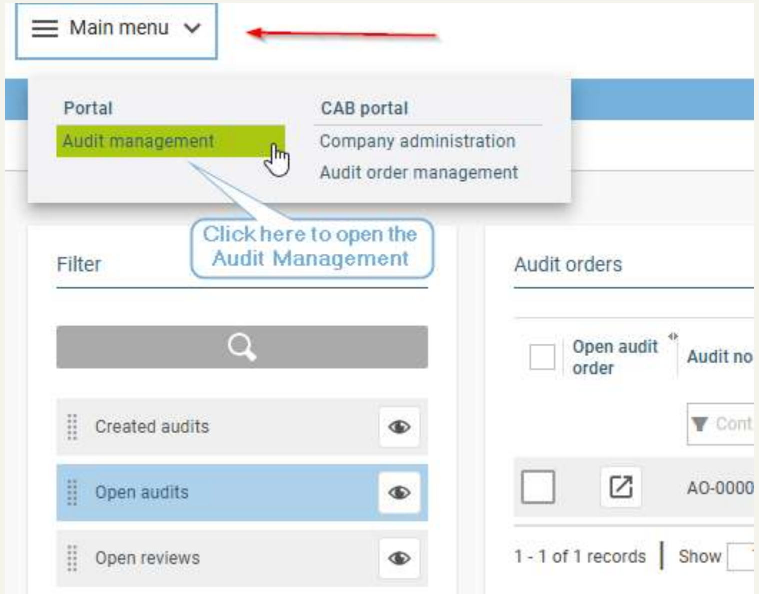
YOU HAVE SUCCESSFULLY CREATED AN AUDIT ORDER IN INTACT.

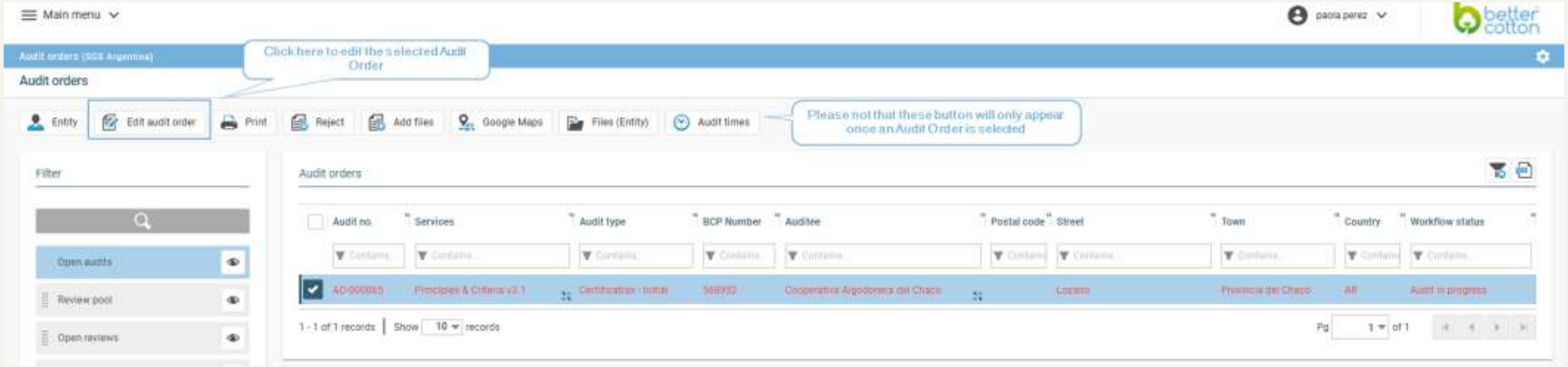
Updating an audit

Only applicable if changes to the audit schedule

You can view and update audit details from the **Open Audits** section by selecting and editing an audit order:

- Go to **Audit Management (NOT audit order management)**
- Select **“Open audits”** in the filter panel on the left
- Click the checkbox next to the audit order
- 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





Updating audit times

Only applicable if changes to the audit schedule

Follow the instruction on the previous slide on how to access the audit order to be updated.

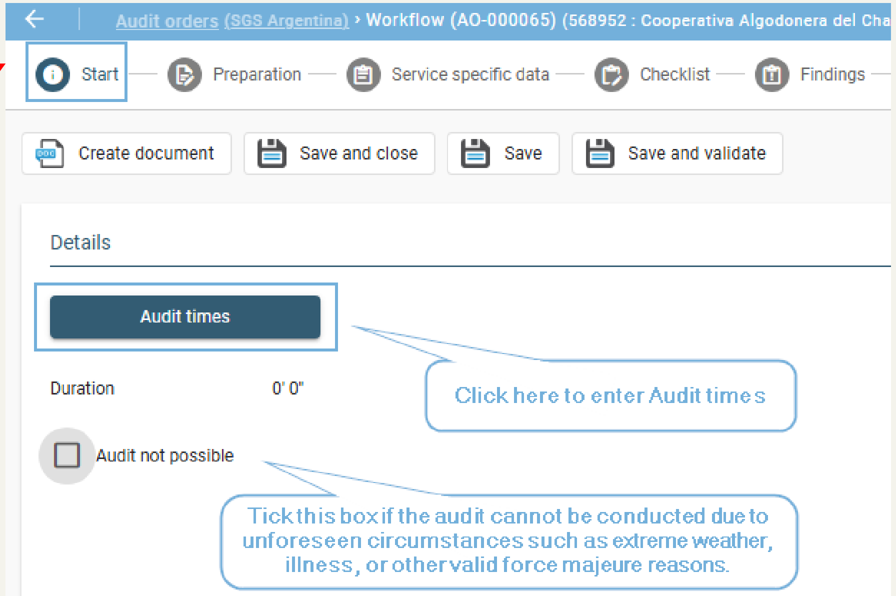
In the Start tab, click the Audit times button: a new window will open

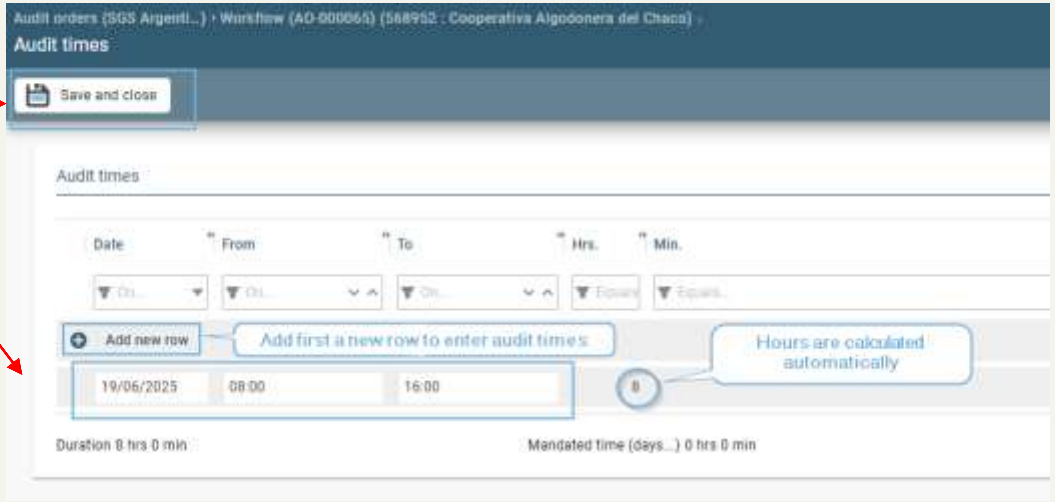
Click Add new row to enter the audit schedule:

- Date of the audit
- From / To time slots

Note: Hours are calculated automatically

Click Save and close to complete the entry



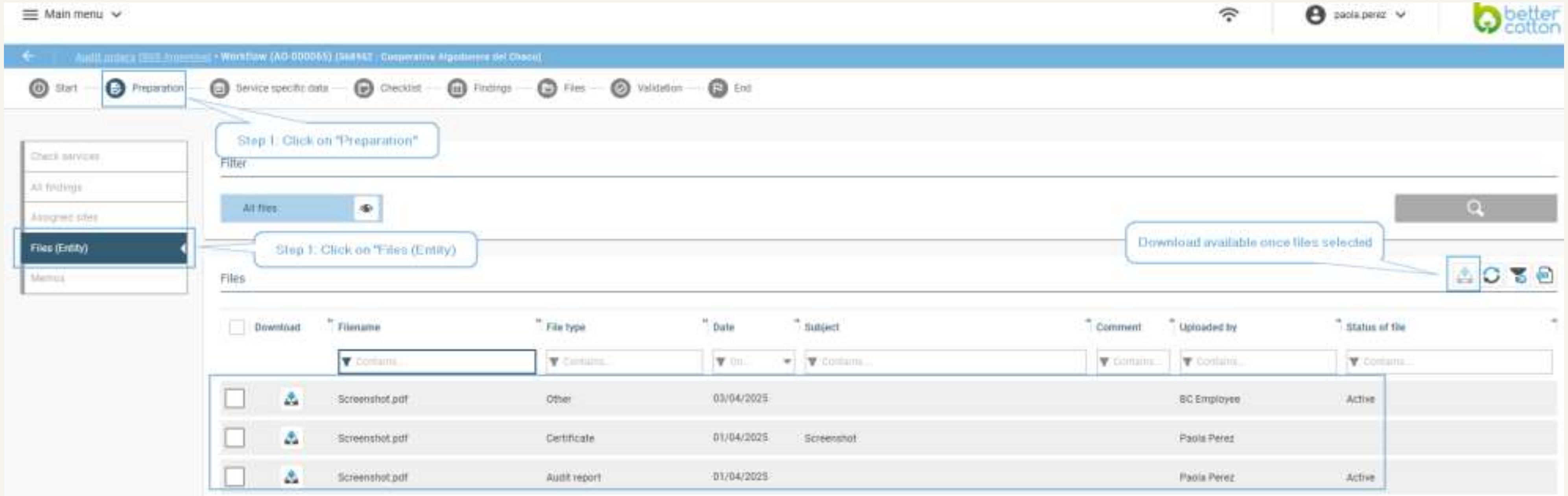


Consult Preparation - Files

In the **Preparation** tab of the Audit Order, you can access files uploaded by BCI.

- 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 BCI appears in the table

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

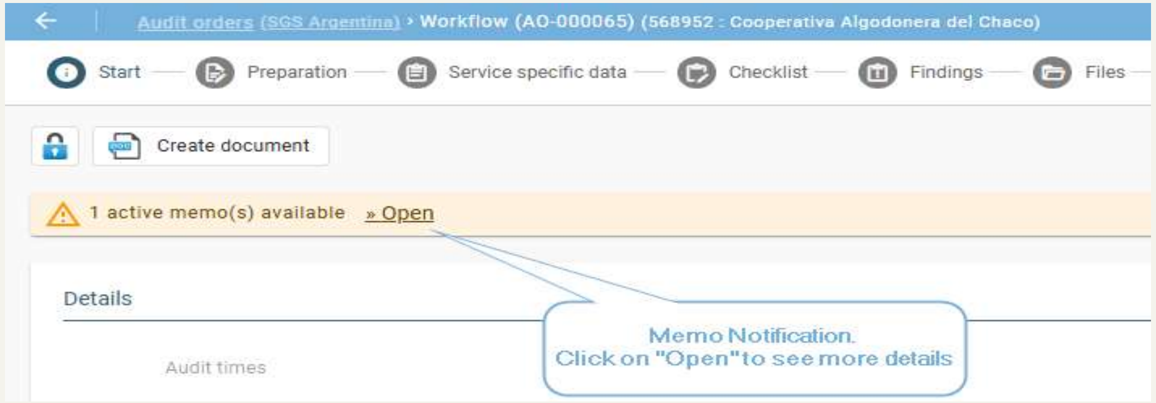


Consult Preparation - Memos

When opening an Audit Order, the CB Admin is notified if BCI 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

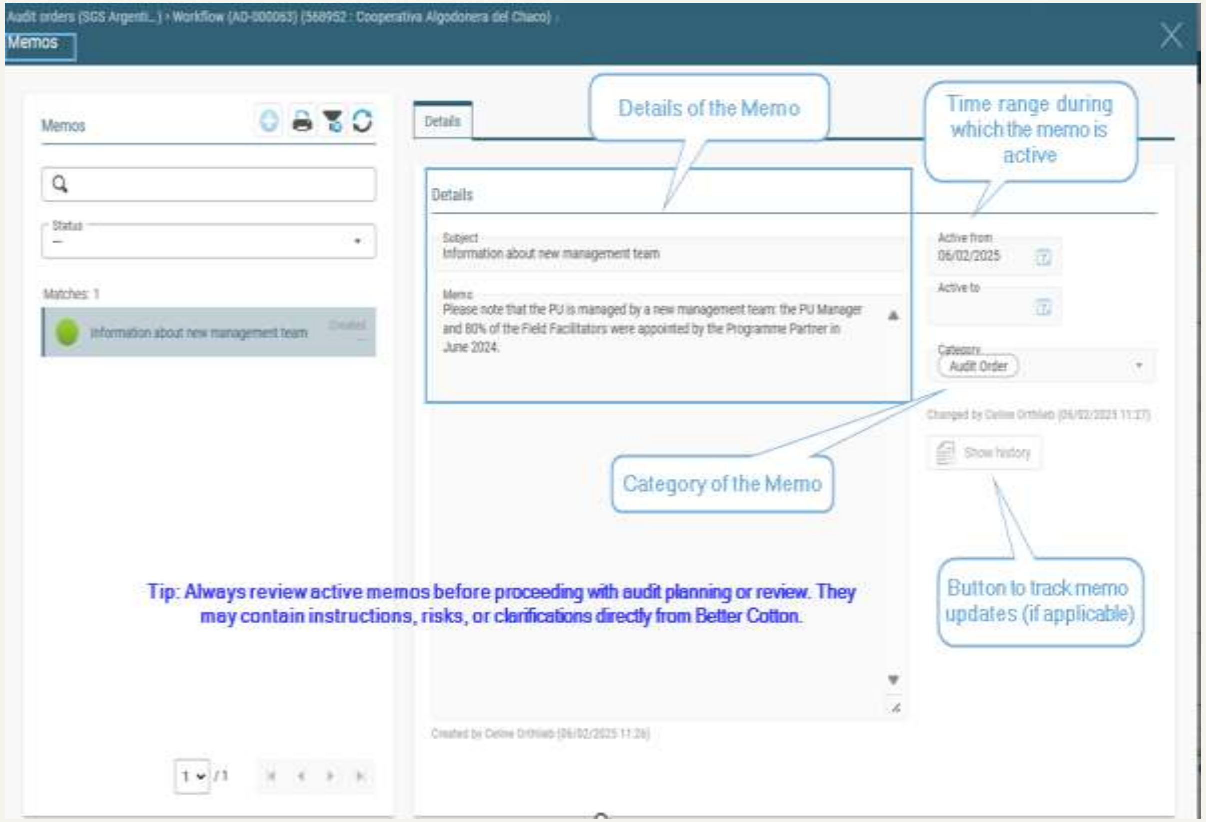


Consult Preparation - Memos

“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.



After the Audit

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

Timeline to complete the Audit Order in INTACT

For BCI CoC Standard audits

CoC Mac V1.2, section 2.7.1.6

The auditor or CB shall submit a copy of the finalised audit report and certificate to both the Organisation/Site and upload the information onto the INTACT platform within 14 calendar days of receipt of the finalised correction action plan (including correction).

For BCI P&Cs Standard audits

PAC MAC V1.3, section 1.5, clause 5.8.9 and clause 5.8.4

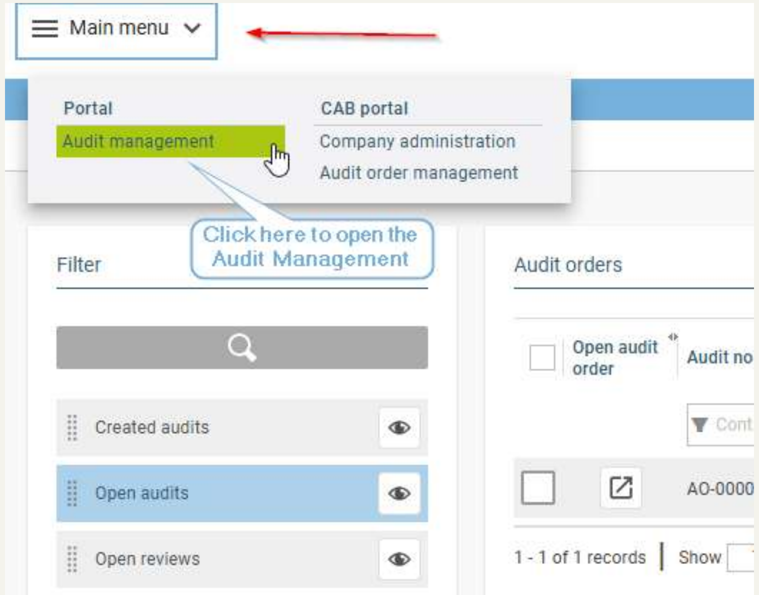
This task shall be completed at the same time as when a decision is taken (within 14 days after CAP submission).

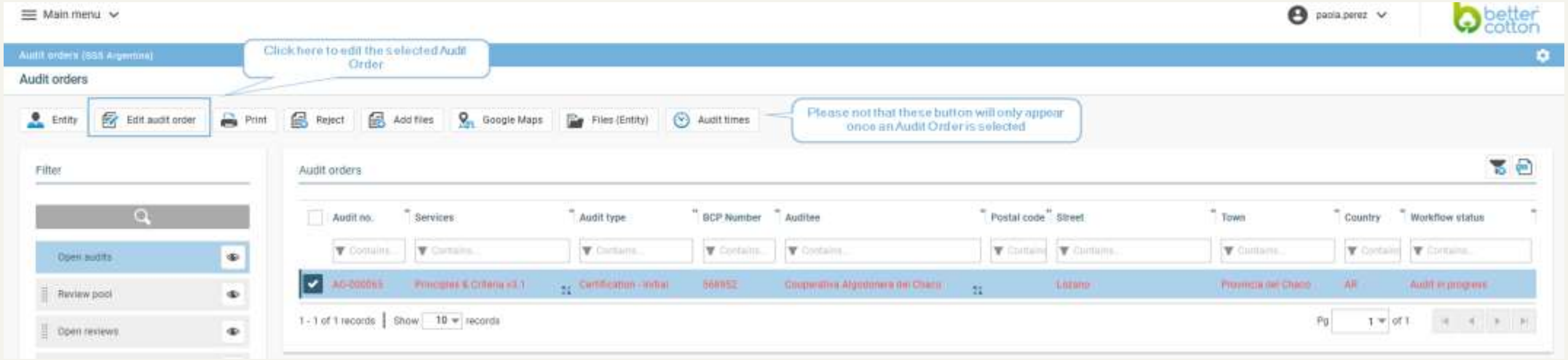
⚠ If certification is denied or withdrawn, consider appeal timeline before closing the audit order – see APPEAL guidance slide for more information.

Open an existing Audit Order

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

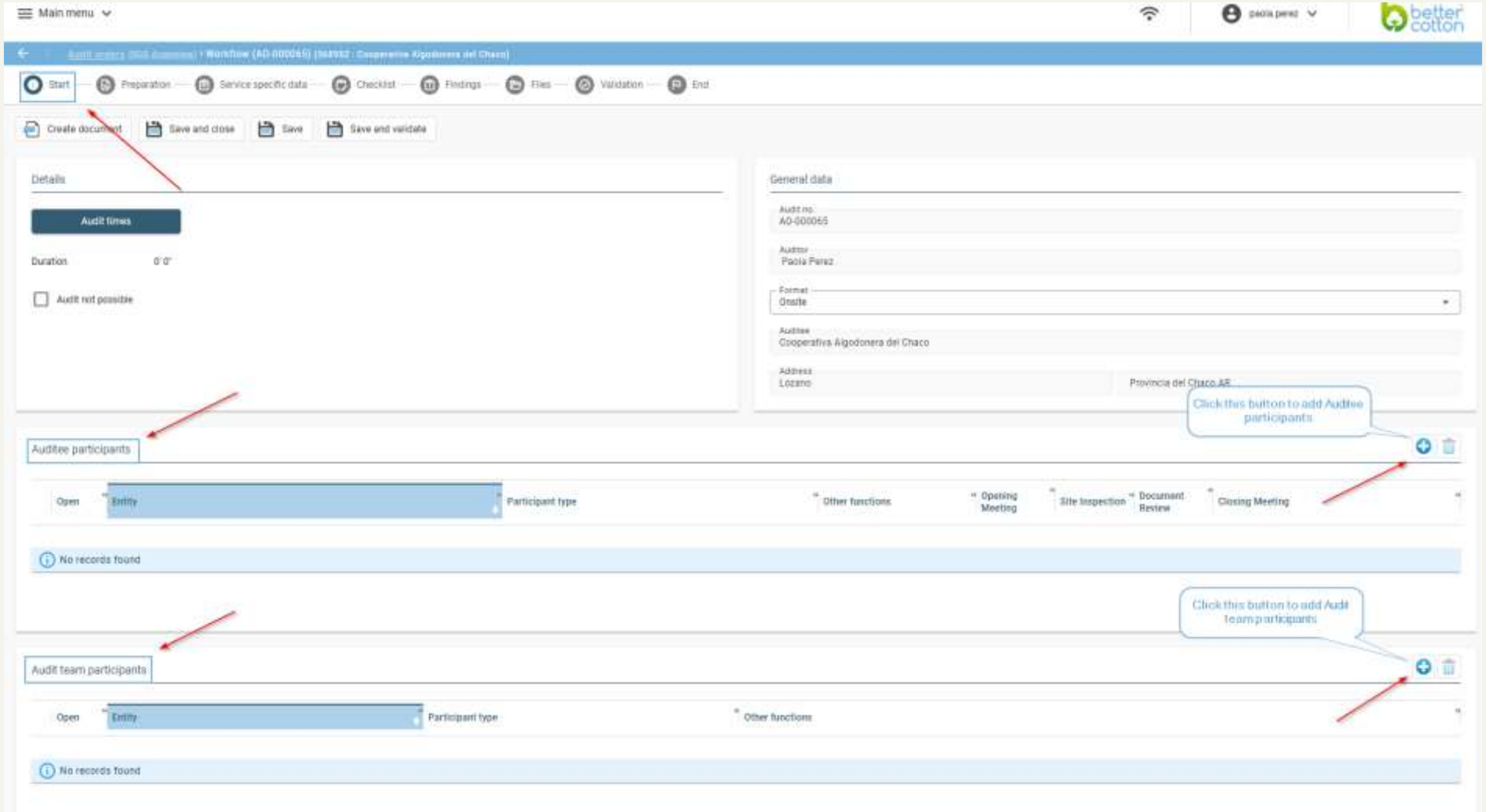
- Go to **Audit Management**
- Select **“Open audits”** in the filter panel on the left
- Click the checkbox next to the audit order
- Click **Edit audit order** in the top toolbar
- The selected audit will open in a new window where you can review and update all related information





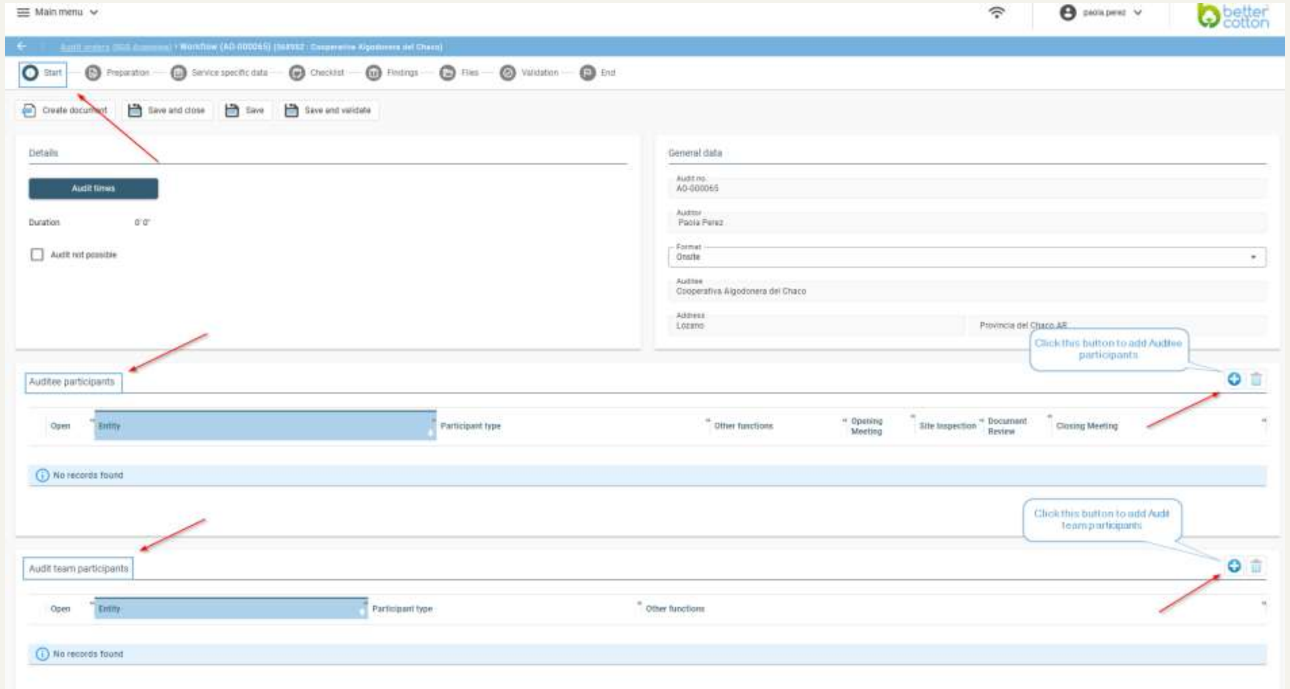
Add Audit Team Participants

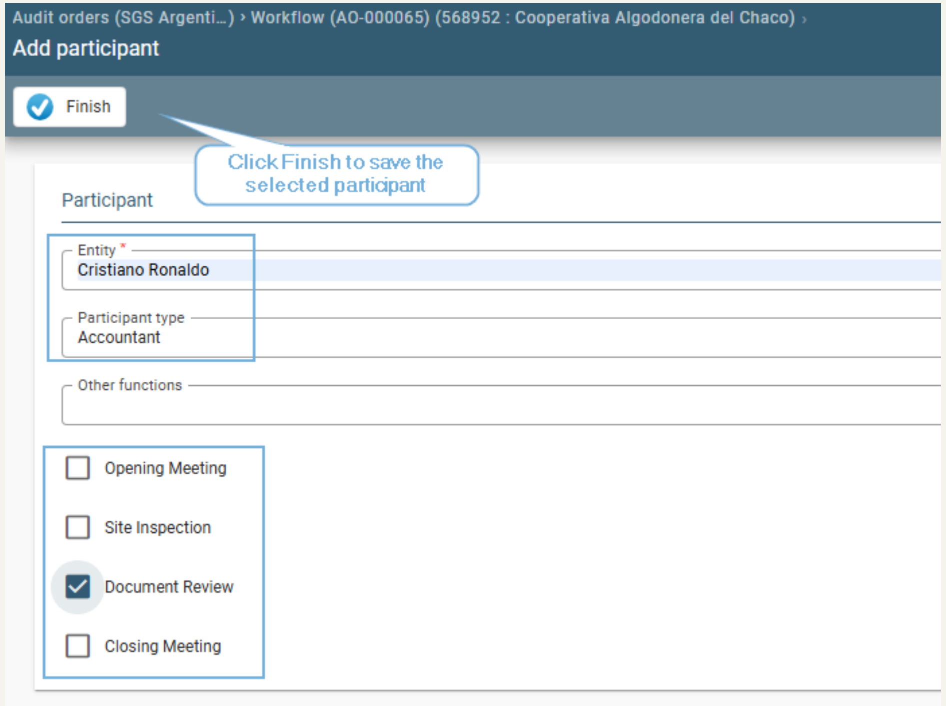
- In the **Start tab** of the Audit Order, scroll down to the sections titled **Audit Team Participants** (supporting auditors, lead auditor).
- Click the **“+” icon** on the right side of the section → A new window will open
- Select participant and required information
- Click **Finish** to confirm



Add Auditee Participants

- In the **Start** tab of the Audit Order, scroll down to the sections titled **Auditee 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, BCI or another party.

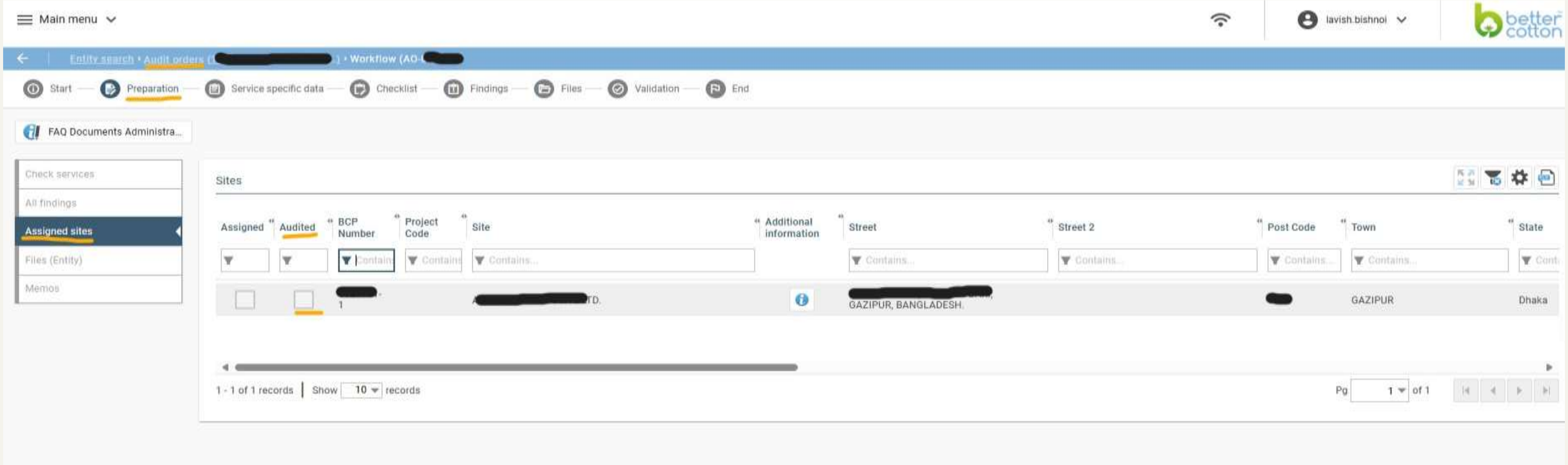
Assign Sites

Only applicable to Chain of Custody Multisite Certification Model

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.

To select the sites:

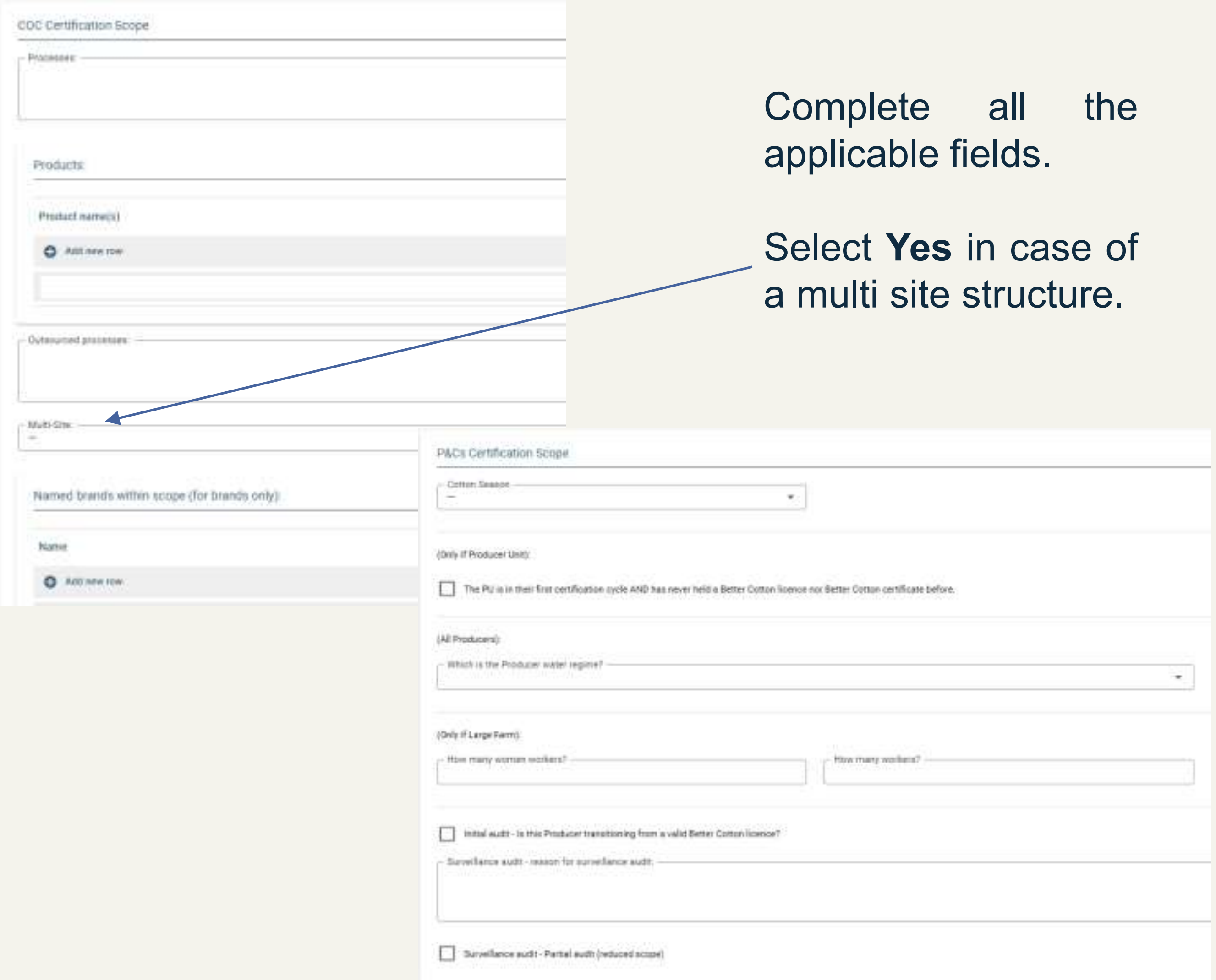
- Click on the **Preparation** tab at the top of the Audit Order workflow
- In the left-hand panel, select **Assigned Sites**
- Tick the checkbox next to each site that was audited



Complete Certification Scope (Service Specific Data tab)

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

- 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.

Complete Checklist

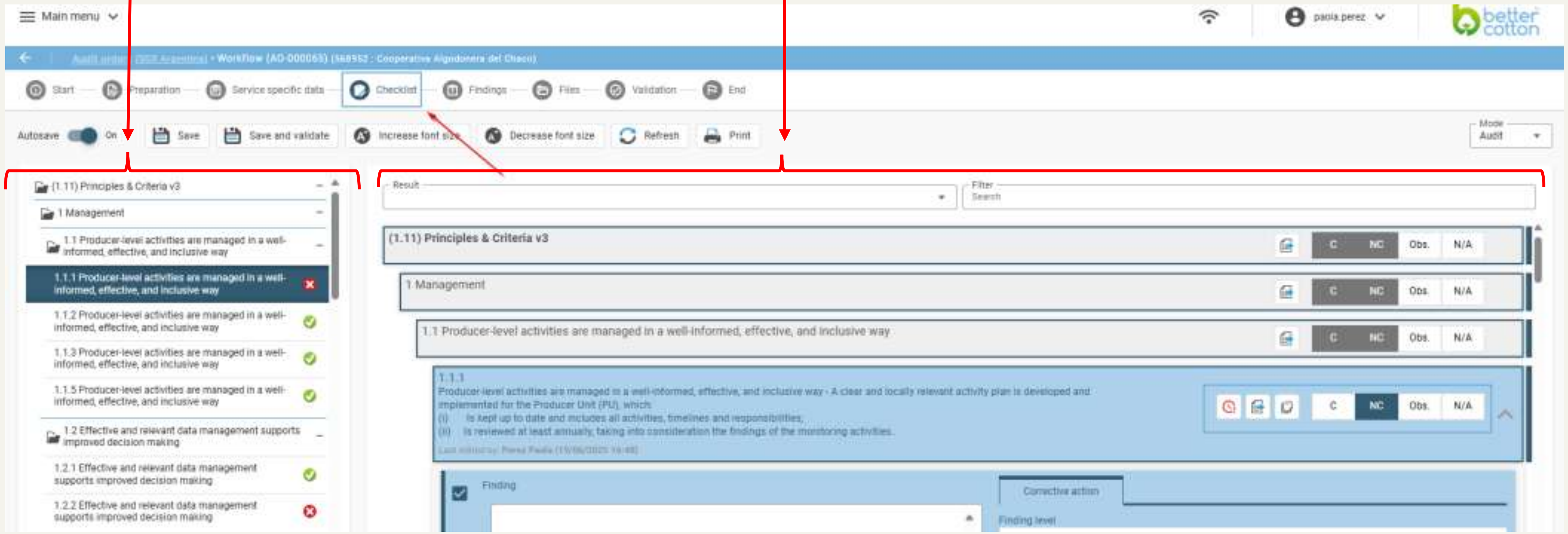
Navigating the Checklist

- Navigate to the **Checklist** tab of the Audit Order.
- On the left, you will find a navigation menu that displays the list of indicators applicable to the current audit order:

Entering Information

- On the right-hand side, you can enter information for each indicator/requirement.
- **By default, all indicators/requirements are marked "Conformity"by default.**
- **In the CoC checklist, Brands/Retailers Requirements (clause 7) are marked "N/A" by default.**
- 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")
  - If auditing a Brand / retailer: update clause 7 requirements to the correct status (C or NC)

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



Applicable Checklist

INTACT allocates the relevant checklist **based on the Auditee profile**:

- P&Cs checklist if Producer
- CoC checklist if chain of custody actor / supplier

INTACT also **tailors the list of requirements / indicators** included in the checklist based on:

- Producer category: Producer Unit of Smallholders, Producer Unit of Medium Farms, Large Farm or Large Farm Group certification.
- CoC actor / supplier category: multisite yes/no

The auditee profile information is **transferred from BCI CRM system (Salesforce)** to INTACT via an API. If the checklist displayed is incorrect, contact compliance@bettercotton.org

If, in accordance with the relevant certification process (P&C MAC or CoC MAC), a requirement / indicator included in the checklist is **not applicable** to the audit you perform, it can be marked as not applicable: for more information see guidance slide on N/A indicators.

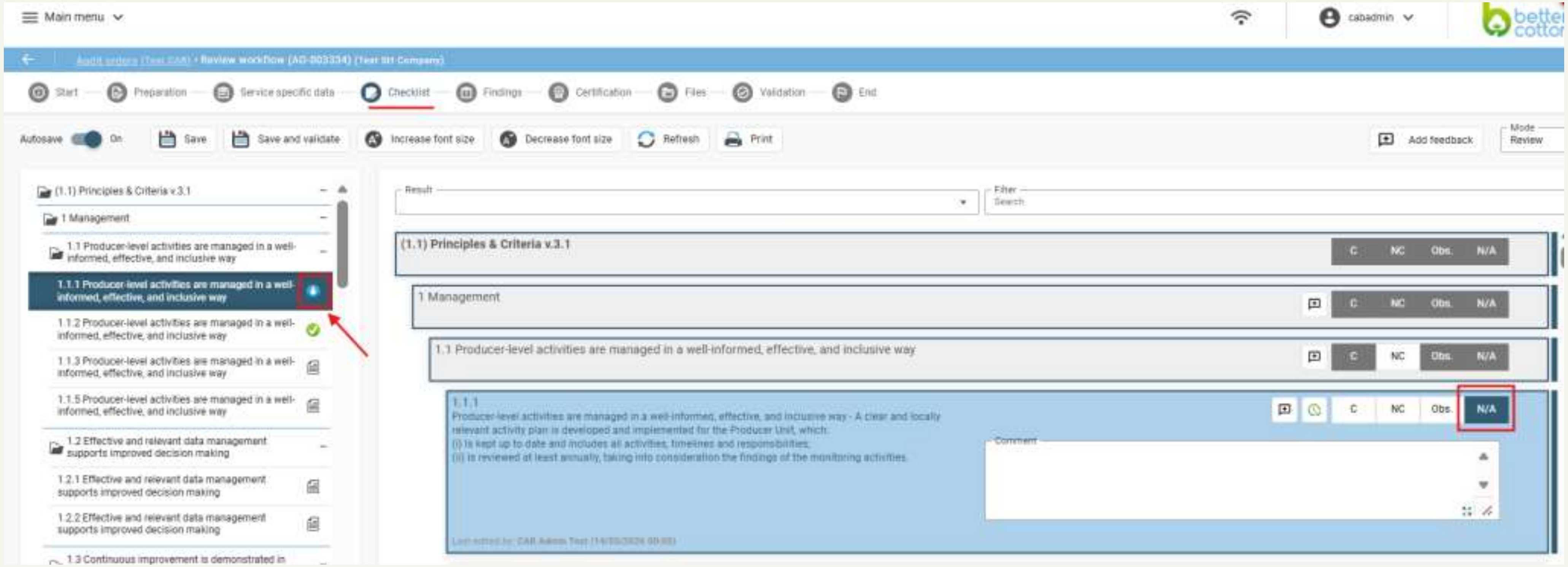
Note for 2026 audits

- For producer audits delivered in 2026 onwards, the applicable checklist is **Checklist P&Cs V3.2**
- For chain of custody actor / supplier audits delivered from 6th January 2026 onwards, the applicable checklist is **Checklist CoC V1.2**

Identify Not Applicable Indicators

If, in accordance with the relevant certification process (P&C MAC or CoC MAC), a requirement / indicator included in the checklist is not applicable to the audit you perform, it can be marked as not applicable:

- Click the “N/A” button next to the relevant indicator
- A new window will open
- When relevant, you can use the comment box to indicate why this requirement/indicator is not applicable to this audit
- Once saved, the indicator will be marked with a **blue arrow icon** on the left-hand side to indicate it is not applicable



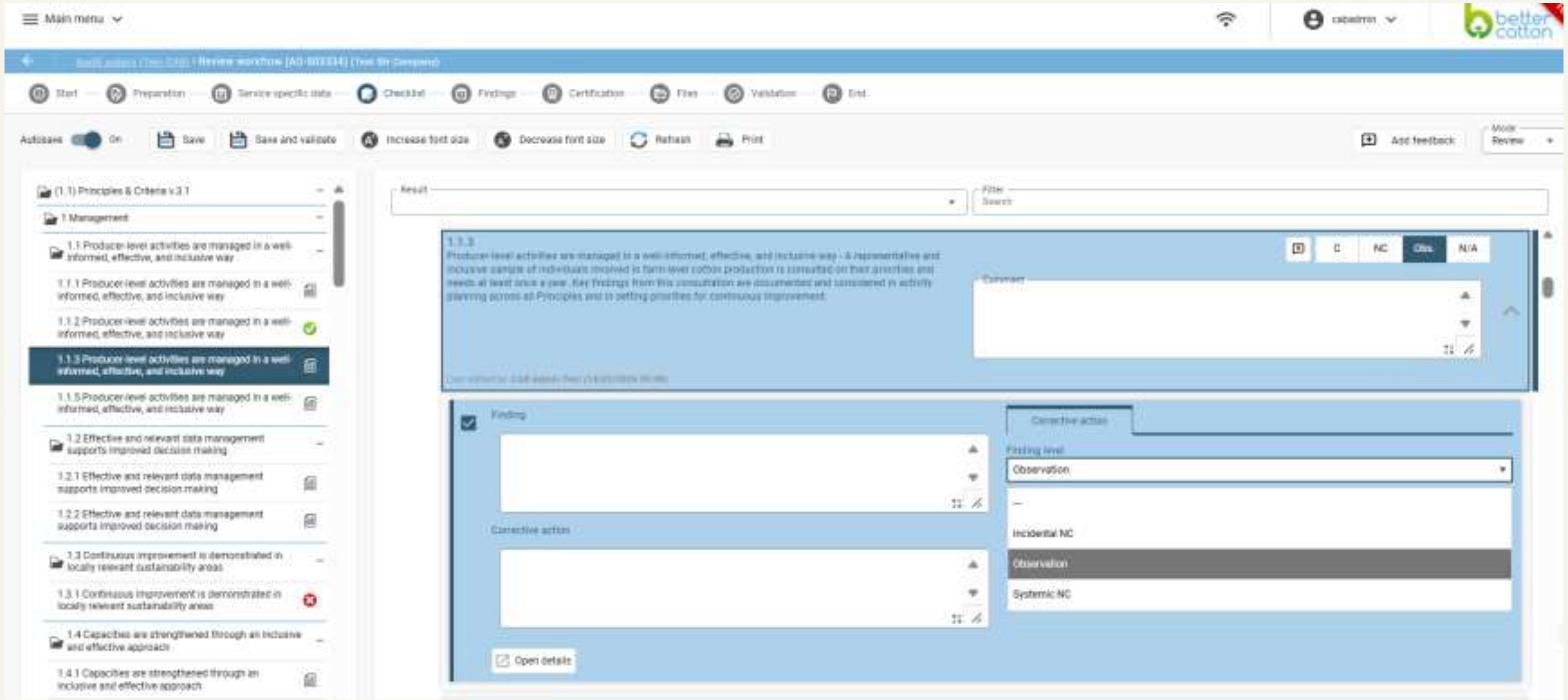
Complete Observations (P&Cs)

For Producers only

If an Observation is identified during the audit:

- Click the “Obs” button next to the relevant indicator
- A new window will open
- Select the appropriate **Finding Level** from the dropdown menu: Observation
- Enter the observation statement in the Finding box.
- Once saved, the indicator will be marked with a note icon on the left-hand side to indicate the Observation.

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



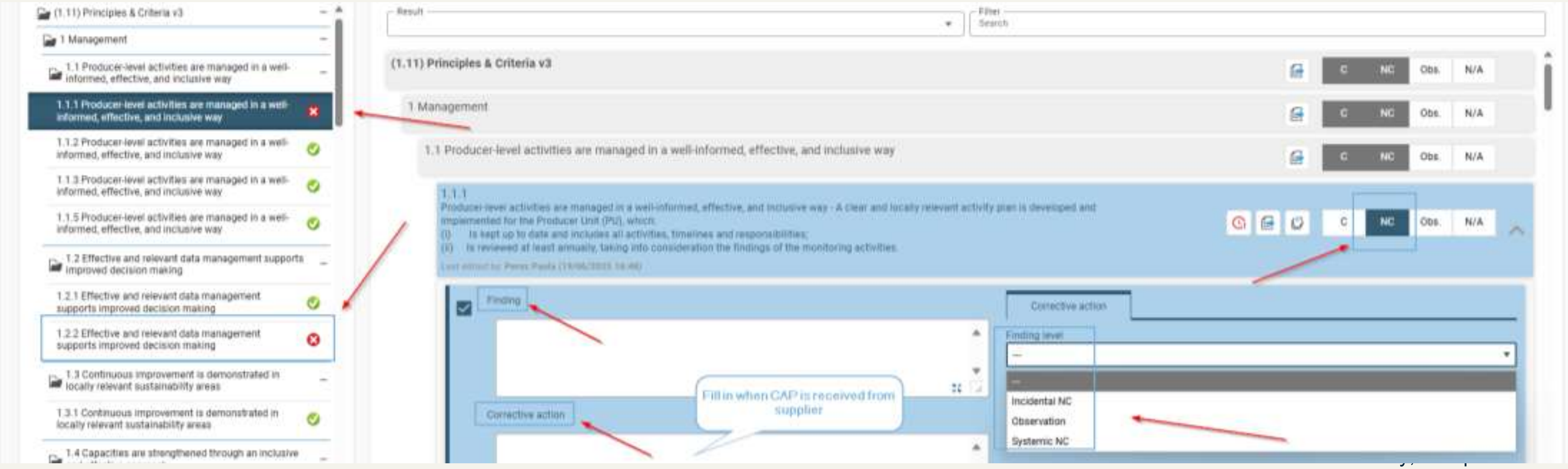
Complete Non-Conformity (P&Cs)

For Producers only

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

- Click the "NC" button next to the relevant indicator
- A new window will open
- Select the appropriate **Finding Level** from the dropdown menu: Incidental NC or Systemic NC
- Enter all required details: see next slide for more guidance on fields to be completed.
- Once saved, the indicator will be marked with a **red X** on the left-hand side to indicate the NC

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



Complete Non-Conformity (P&Cs)

For Producers only

Entering Non-Conformity (NC) Details in the Checklist

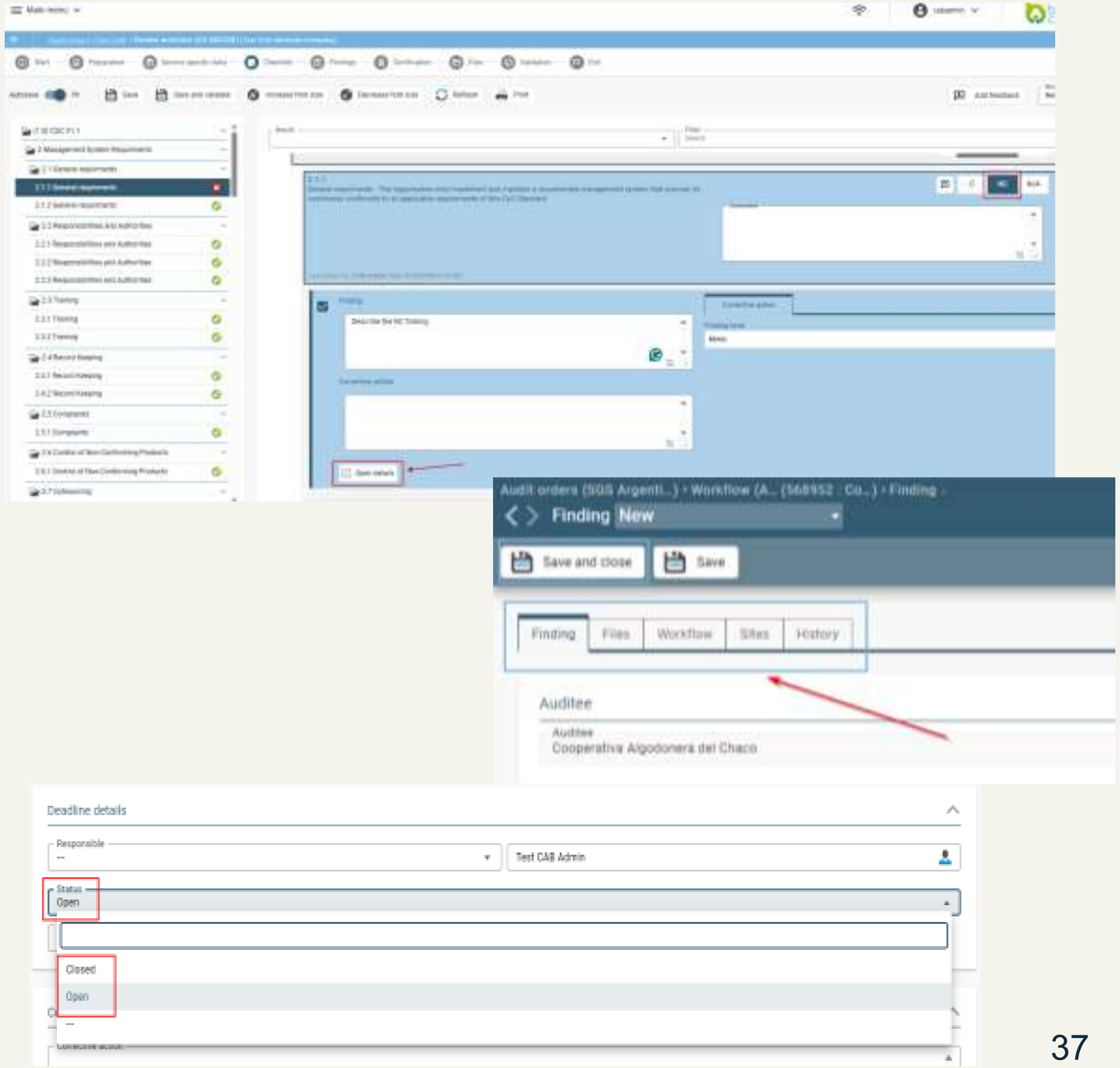
- Mark the Clause as **Non-Conformity (NC)** in the checklist.
- Provide a description of the NC and select the appropriate finding level (e.g., Incidental, Systemic).
- Click **“Open Details.”**
- Enter any additional information related to the NC under the Findings section (if any information was not captured in the earlier steps).

Closing the NC (If Applicable)

If the NC has been closed and the Corrective Action Plan (CAP) has been implemented, and the CB has evidence for closure:

- Scroll down to the **“Deadline Details”** section under **Findings**.
- From the dropdown menu, select **“Closed”** as the status of the NC.
- When applicable: click on **“Files”** and upload supporting documents as evidence of NC closure.
- Click **“Save and Close”** to confirm and record the entry.

If the Corrective Action Plan (CAP) has not yet been implemented and the Non-Conformity is not closed, leave the status as “Open.” and proceed with the remaining steps.



Complete Non-Conformity (CoC)

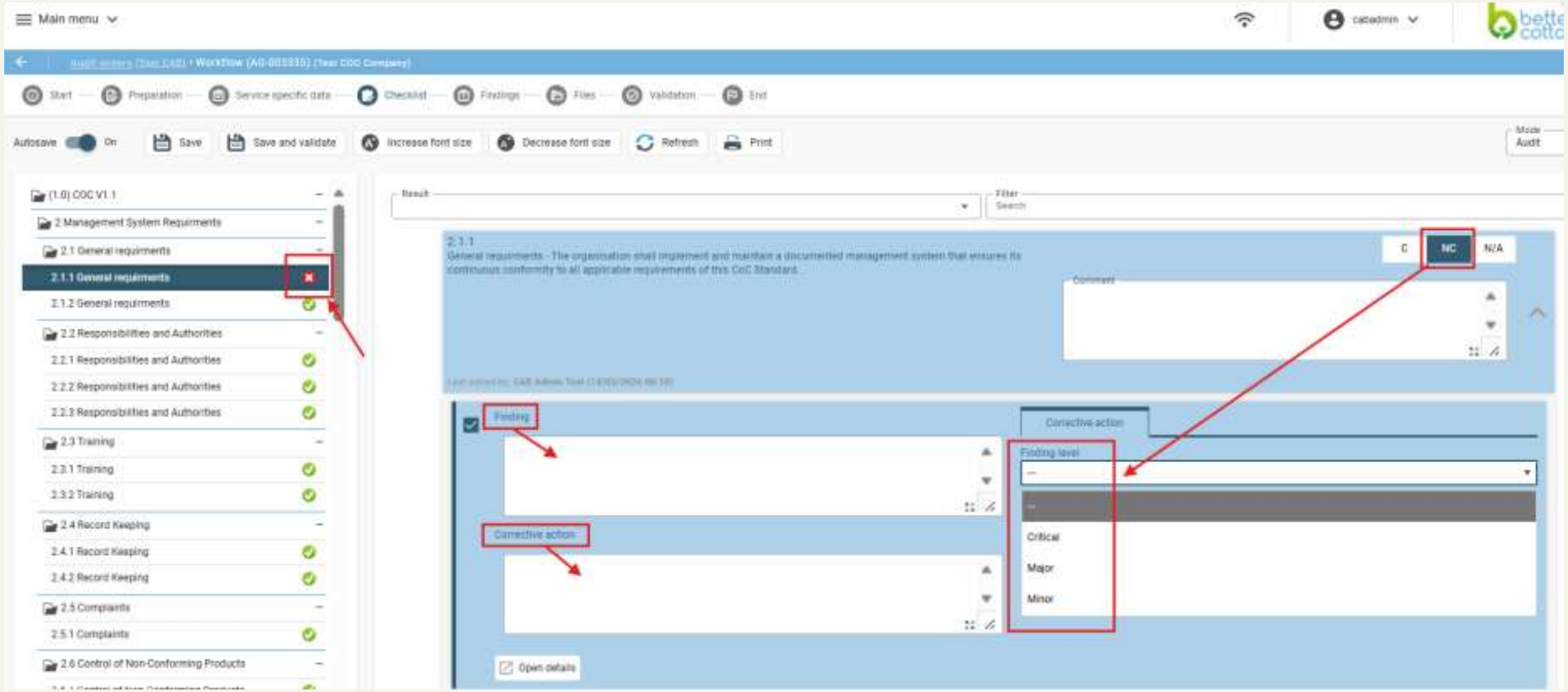
For CoC only

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

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

- Click the “NC” button next to the relevant indicator
- A new window will open
- Select the appropriate **Finding Level** from the dropdown menu: Minor, Major or Critical
- Enter all required details: see next slide for more guidance on fields to be completed.
- Once saved, the indicator will be marked with a **red X** on the left-hand side to indicate the NC

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



Complete Non-Conformity (CoC)

For CoC Only

Entering Non-Conformity (NC) Details in the Checklist

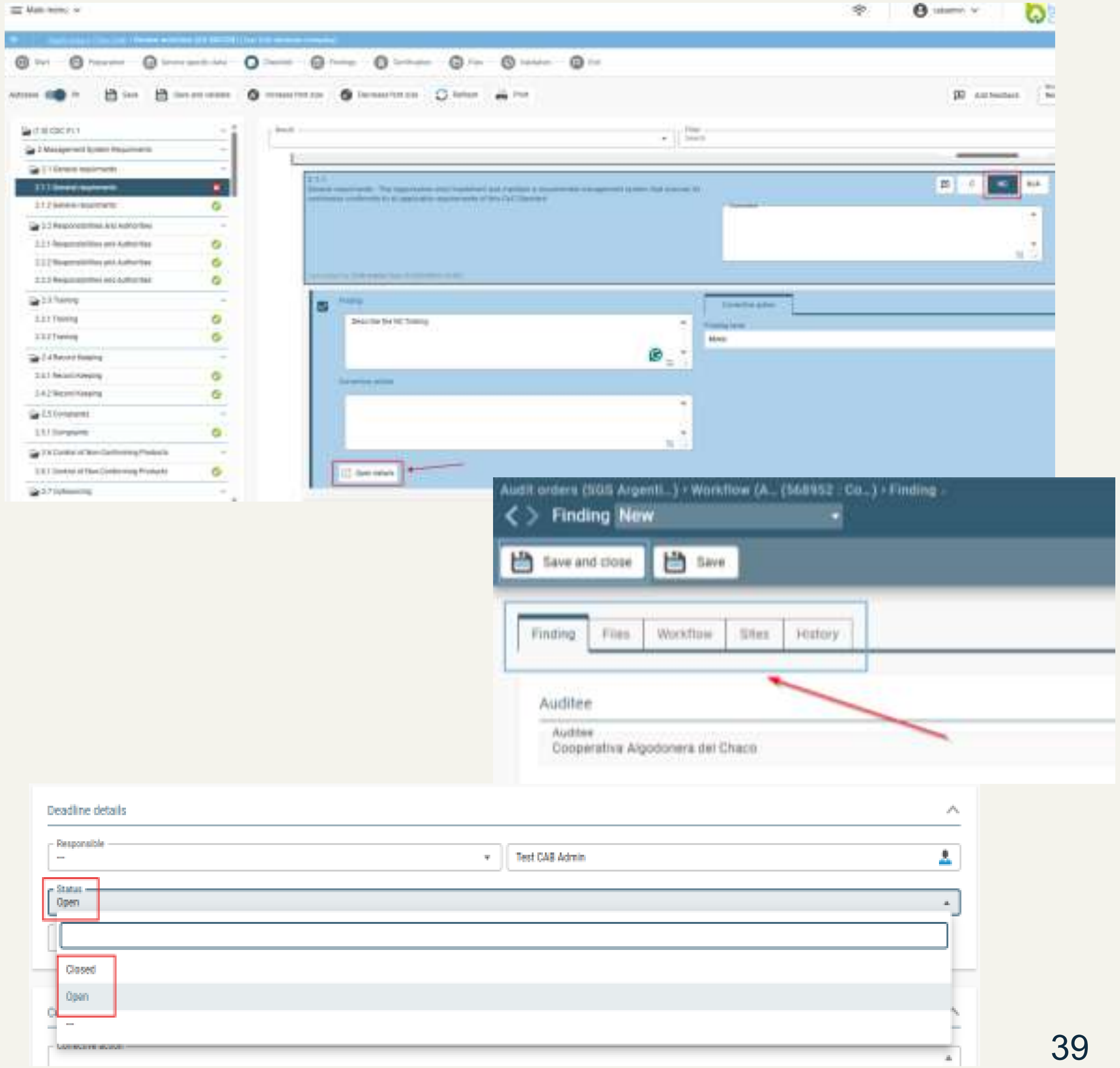
- Mark the Clause as **Non-Conformity (NC)** in the checklist.
- Provide a description of the NC and select the appropriate finding level (e.g., Minor, Major, Critical).
- Click **"Open Details."**
- Enter any additional information related to the NC under the Findings section (if any information was not captured in the earlier steps).

Closing the NC (If Applicable)

If the NC has been closed and the Corrective Action Plan (CAP) has been implemented, and the CB has evidence for closure:

- Scroll down to the **"Deadline Details"** section under **Findings**.
- From the dropdown menu, **select "Closed"** as the status of the NC.
- Click on **"Files"** upload supporting documents as evidence of NC closure.
- Click **"Save and Close"** to confirm and record the entry.

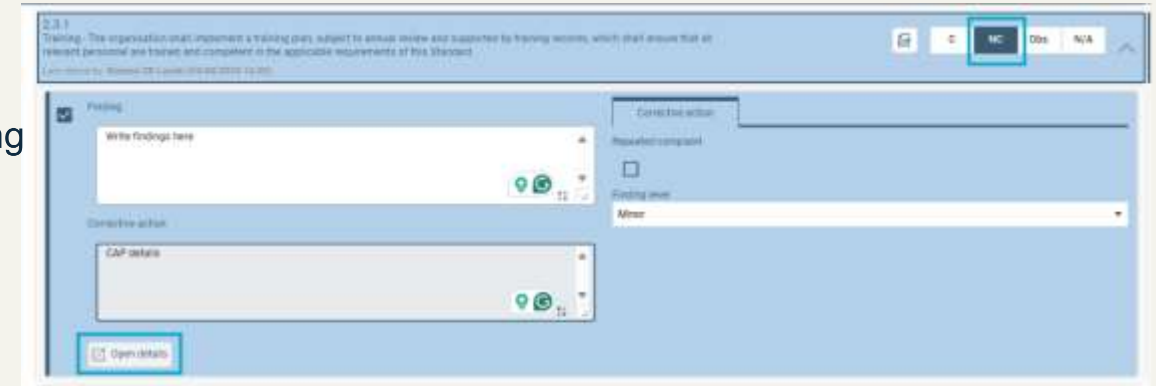
If the Corrective Action Plan (CAP) has not yet been implemented and the Non-Conformity is not closed, leave the status as "Open." & proceed with the remaining steps.



Findings - multisite (CoC)

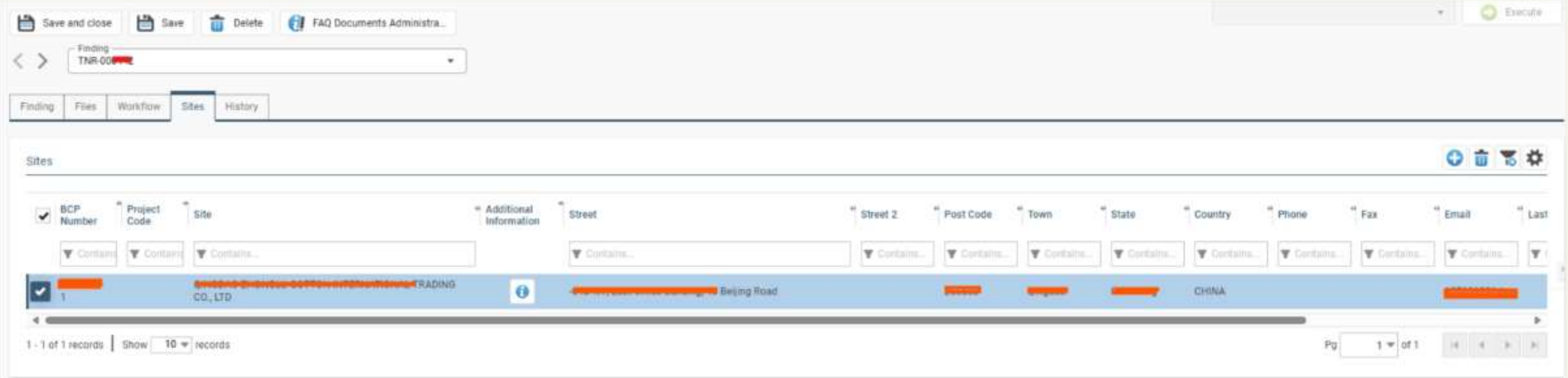
Only applicable to Chain of Custody Multisite Certification Model

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



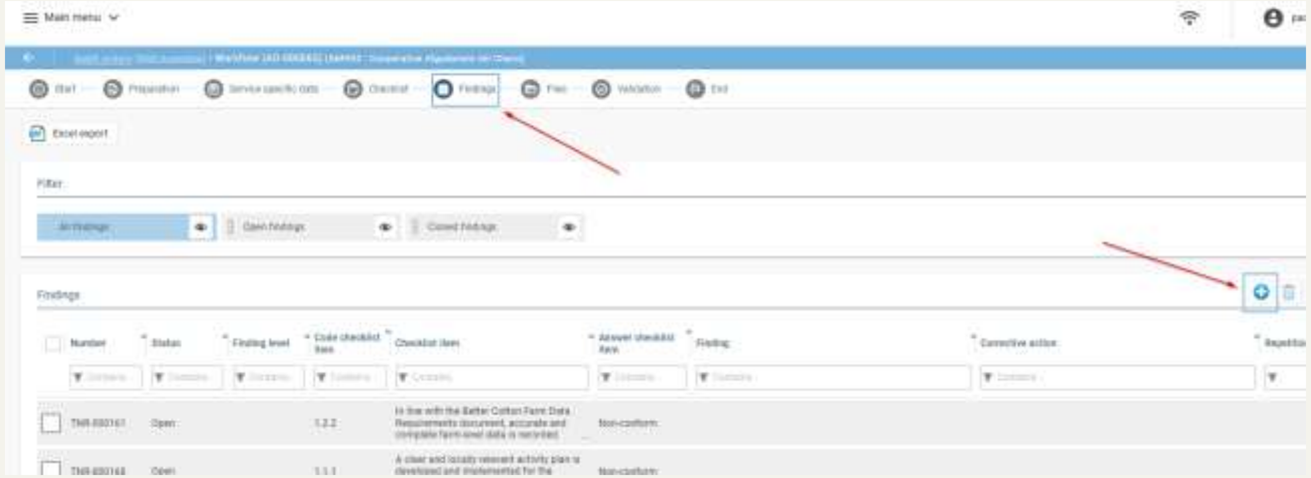
Check Findings

Once you have completed the checklist tab of the audit, you have the possibility to click on the next tab of the Audit Order: “Findings”.

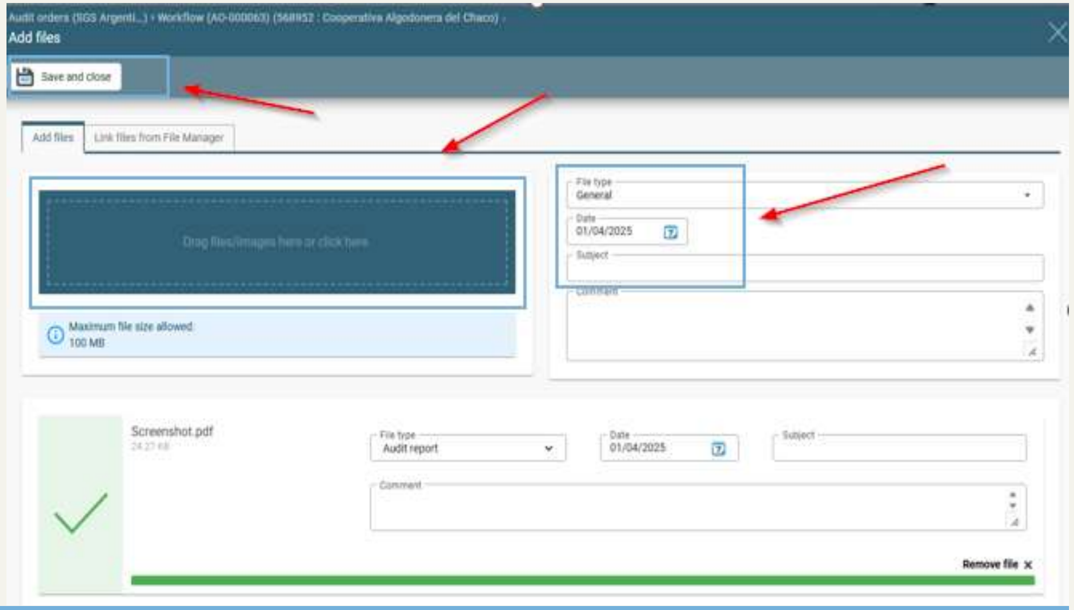
This tab gives you a list/view of all the Non-Conformities (and Observations for P&Cs) you have entered in the checklist:

- You can use it to quickly compare with your audit report summary to check you have not missed any findings to declare.
- You can also use it to quickly check whether the non-conformities statuses are correct (open/close).

If any entry needs to be added or corrected, you can do so on this tab or navigate back to the checklist tab to update the relevant information.

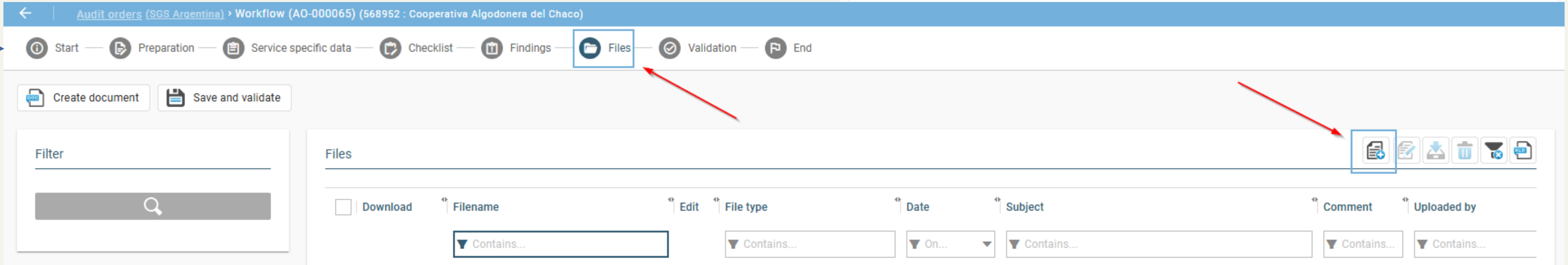


Update Files



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 along with other supporting documents. In addition, all findings (NCs, Observations) and Corrective Action Plans (CAPs) must be entered directly into INTACT.

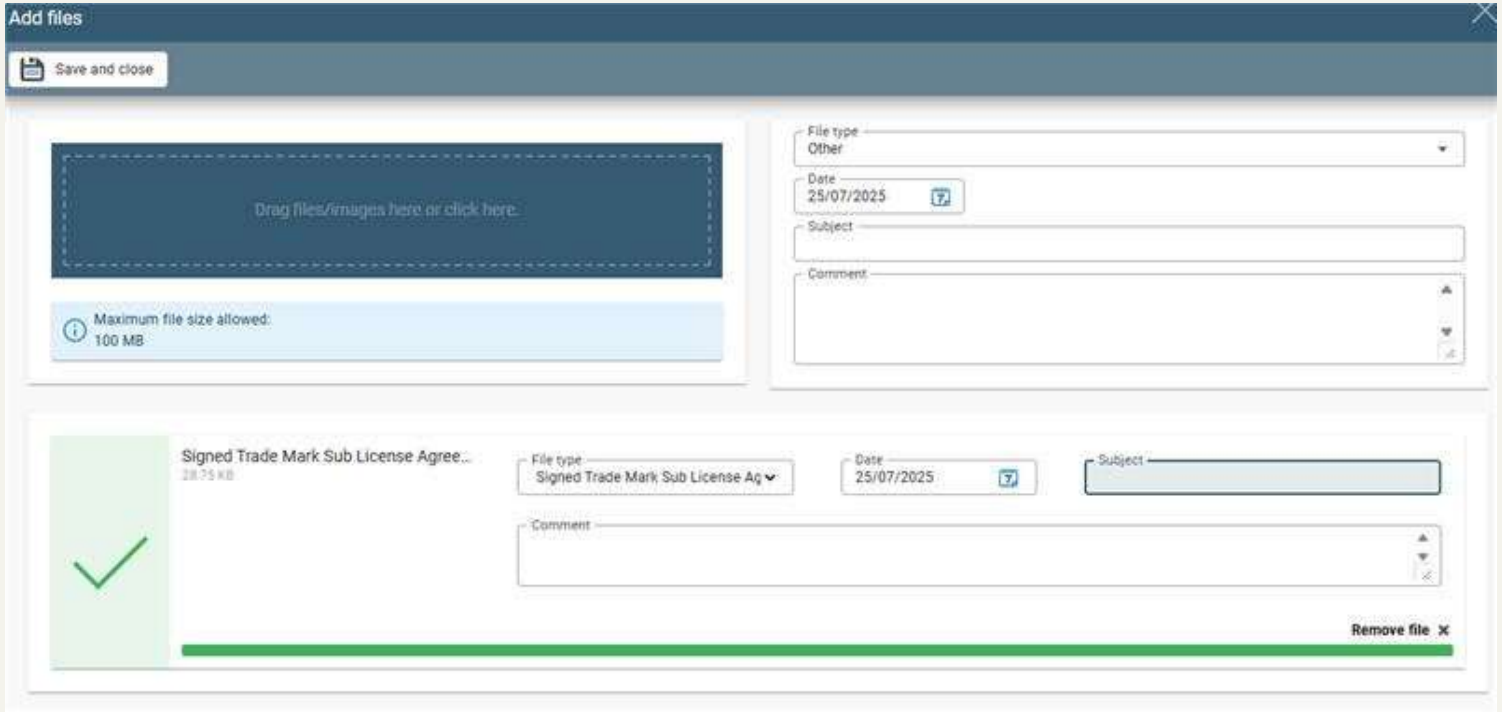
Update Files (TM)

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

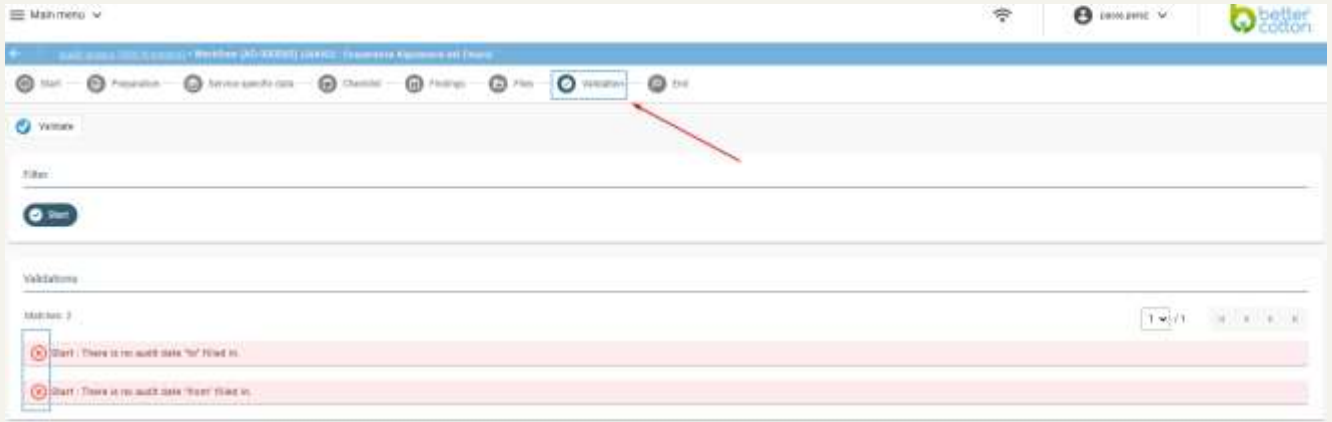
Validate Audit Order

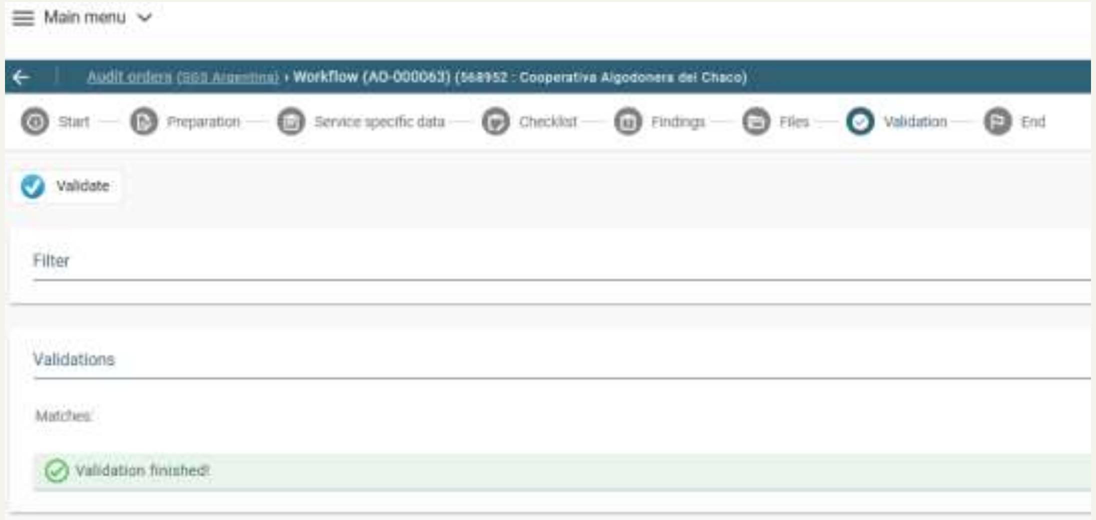
The **Validation** tab helps the CB Admin to ensure that all required steps of the audit have been completed before the audit order can be finalized.

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

Warning: the validation rules only consider minimum data required for the INTACT process to validate, but it does NOT include all data required by the BCI process – **always check you have met all BCI requirements** – see P&Cs data summary and CoC data summary





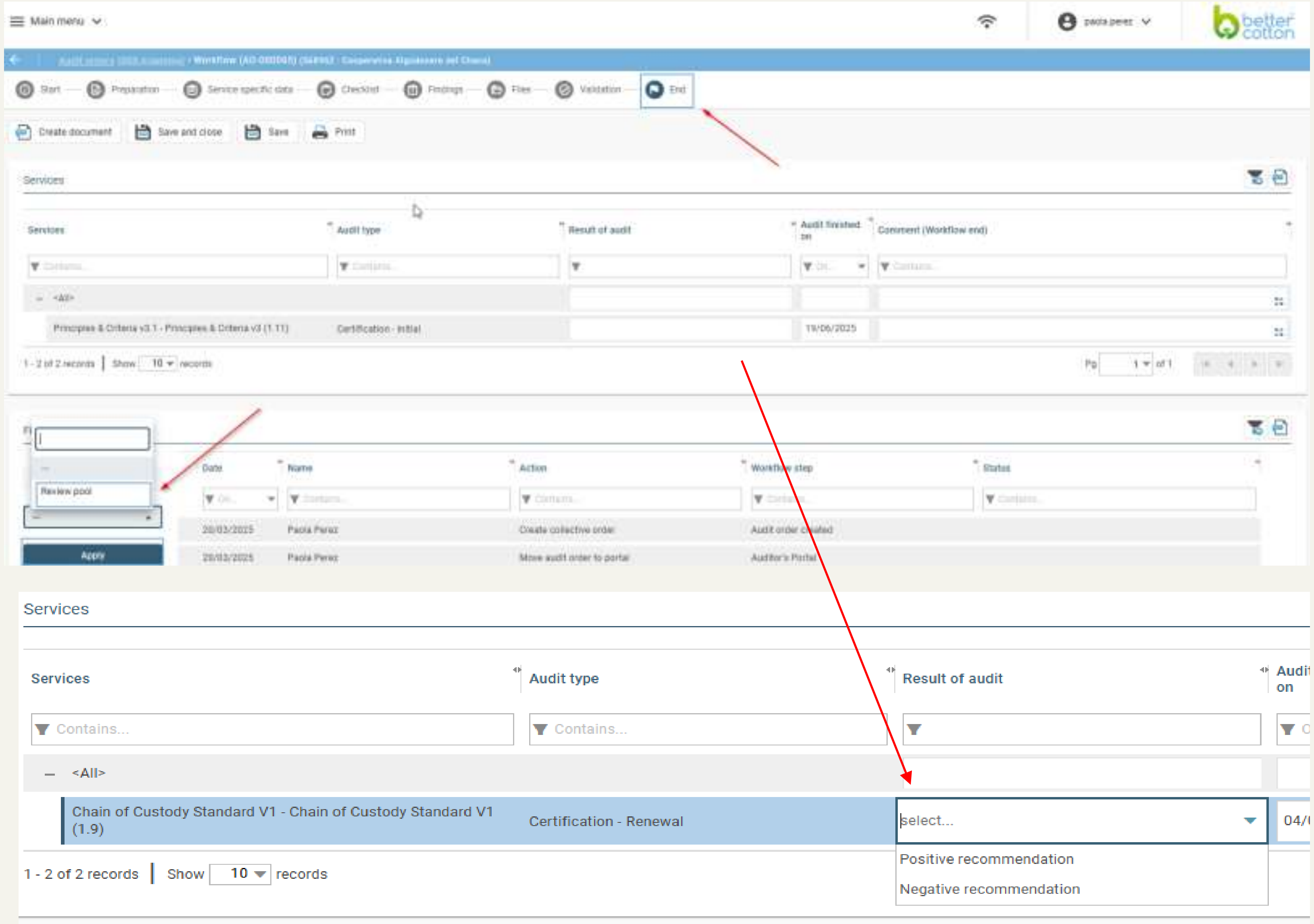
Transfer Audit Order to the last step

Once all information is complete and validated, you must finalise the audit:

- Go to the **End** tab of the Audit Order
- Under the **"Result of audit"** select the option from the dropdown (Positive or Negative Recommendation)
- In the bottom-left corner, open the **“Review Pool”** dropdown menu
- Select the appropriate "review pool"
- Click the **“Apply”** button

INTACT will push the audit order to the “review step”.

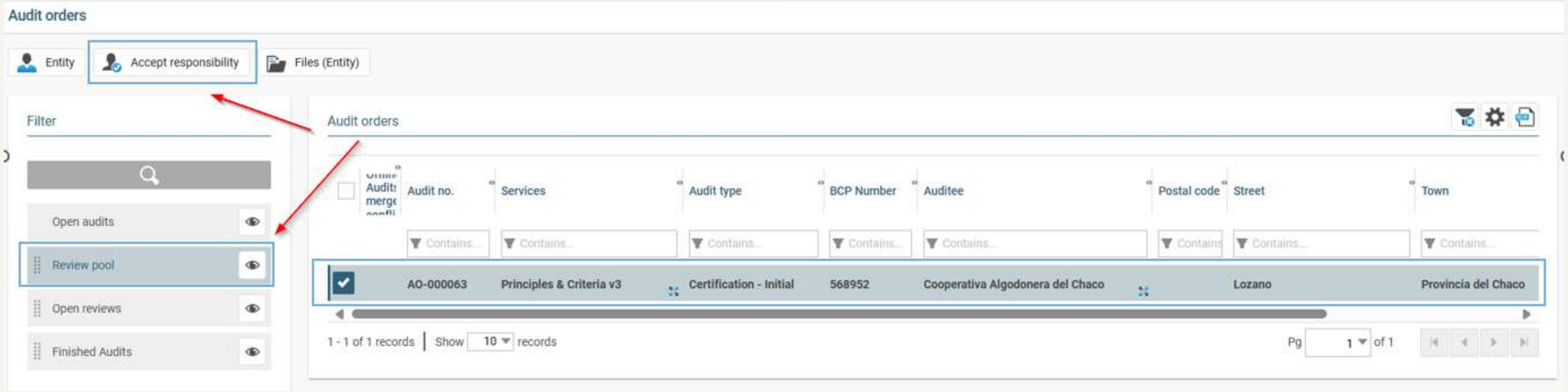
Warning: Only use this step after all findings, documents, and audit data have been entered. [See recommendation in case of Appeal.](#)



Transfer Audit Order to last step

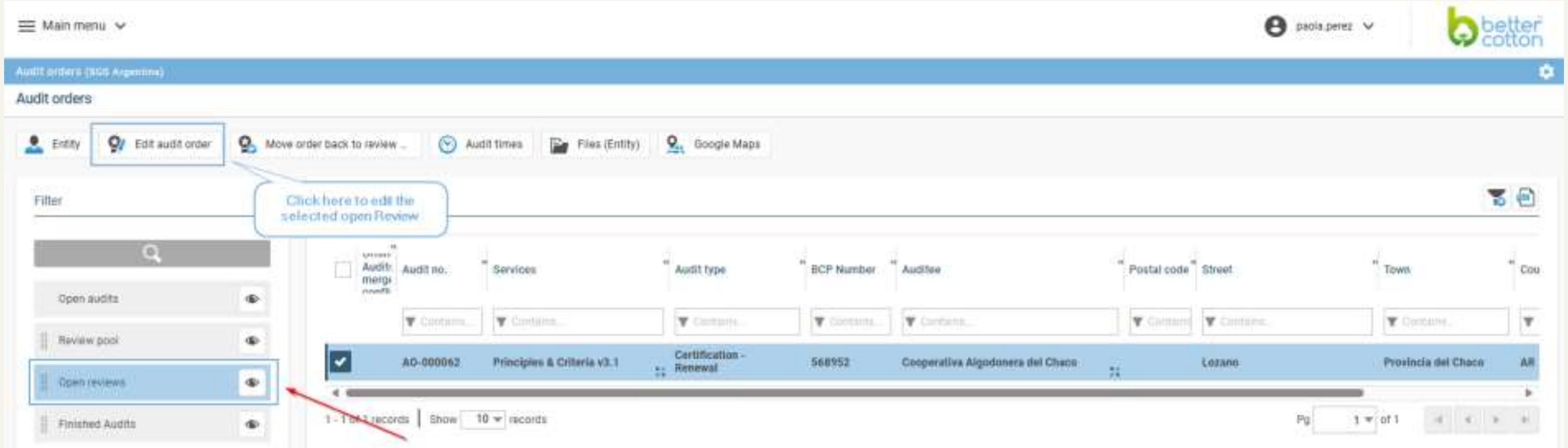
INTACT redirect you to the **Start page**. The audit order is now listed in the **Review Pool**.

- In the left-hand menu, click **Review pool**
- **Find your audit order** in the 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"**



Complete Audit Order last step

- In the left-hand menu, click **“Open Reviews”**
- **Find your audit order** in the list
- 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 you to finalise



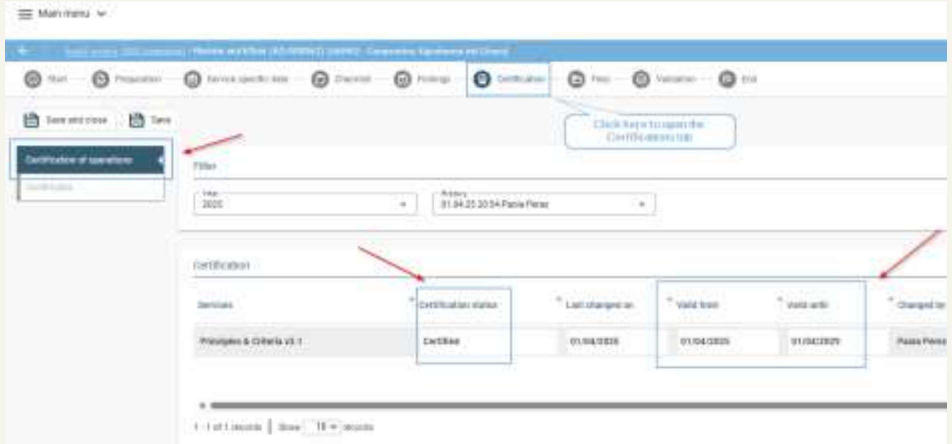
Update Certification status

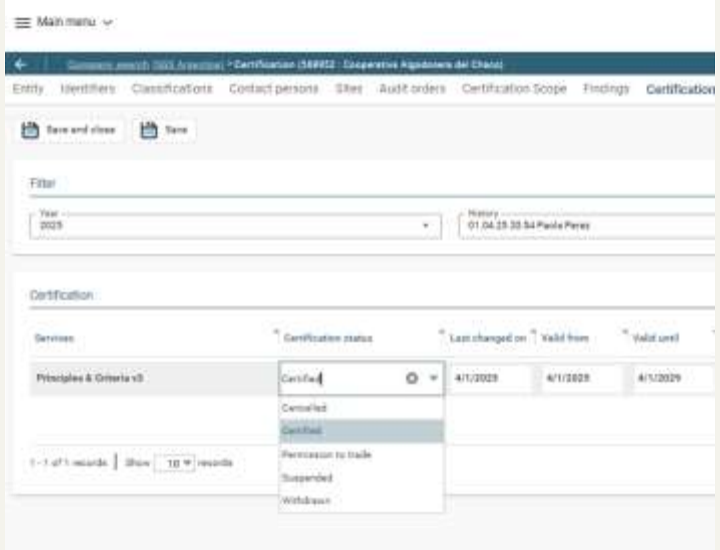
You can now access the **Certification tab** to update the **certification decision:**

- On the left, click 'Certification of operations'
- In the **Certification Status** dropdown, select the **certification decision**:
  - **Cancelled -** This status must be selected if an organisation fails their initial audit and certification cannot be granted or when an organisation voluntarily cancels their certificate at any stage.
  - **Certified** - Select this status upon successful completion of the audit and when the certificate has been awarded or renewed
  - **Permission to trade (for P&Cs only)** (see additional guidance)
  - **Suspended -** This status can only be selected if an organisation holds a valid certificate at the time the suspension decision is made
  - **Withdrawn -** Select when an organisation certificate is withdrawn by the Certification Body (CB) as per clause 3.6 of the MAC. This status can only be selected if an organisation holds a valid certificate at the time the withdrawal decision is made.
- Enter the **Valid From** and **Valid Until** dates
- Add comment if applicable
- Click **Save and Close** to confirm the certification decision

Warning: The Certification status information you complete in INTACT directly impact the list of certified organisations published on the BCI website.

Warning for CoC: This tab triggers BCI 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.



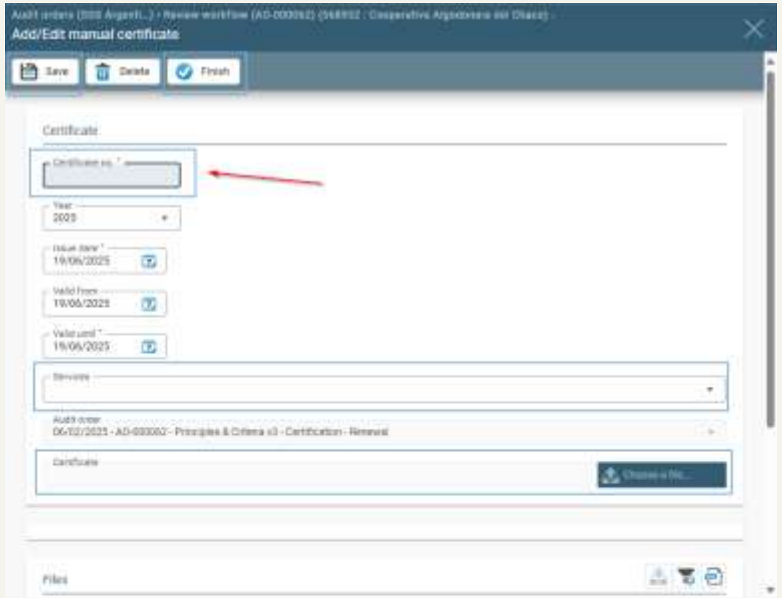


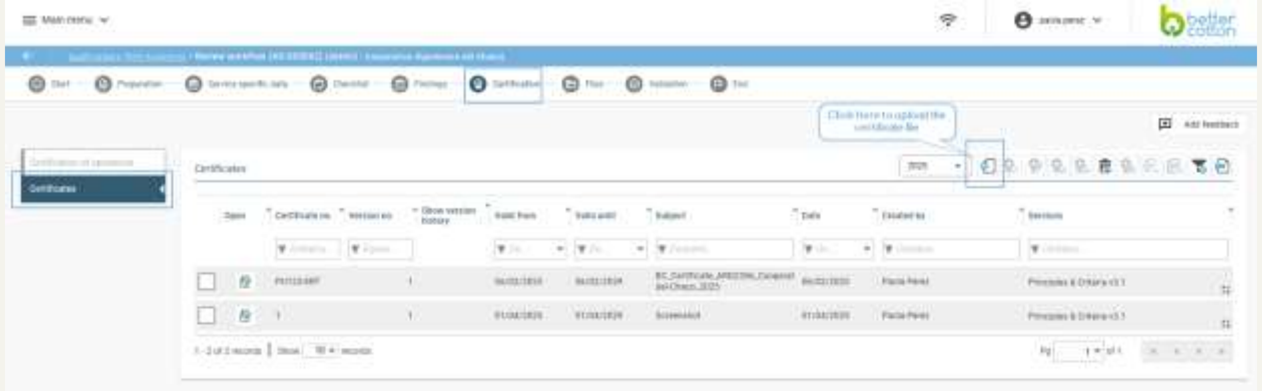
Upload Certificate

After completing the certification status, you must upload the official document:

- If certified: certificate file
- If permission to trade (P&Cs only): permission to trade letter

- 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)
  - **Issue date**
  - **Valid from / Valid until dates**
- Upload the file (**PDF format**)
- Click **Save and Finish**

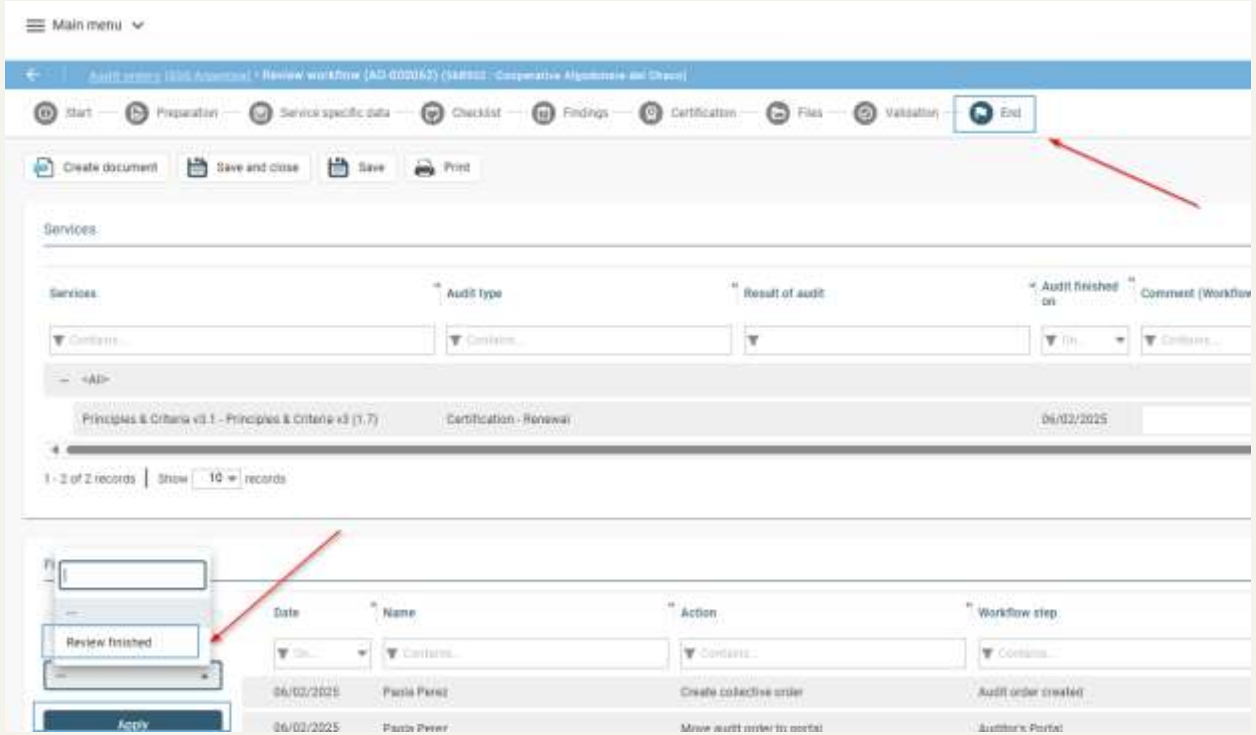




Warning: The Certificate information you complete in INTACT directly impacts the list of certified organisations published on the BCI website.

Close Audit Order

- 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 closes the Audit Order.

YOU HAVE SUCCESSFULLY COMPLETED AN AUDIT ORDER IN INTACT

Correcting an Audit Order

If you need to correct the **findings** of an audit order which has already been finished / closed in INTACT, please contact compliance@bettercotton.org Include full details as to why this is necessary as well as AO reference number. Our support team will be able to re-open the audit order for the CB Admin to correct information.

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.
- An Audit Order does not need to be re-opened to update the following tabs – for those you can access the aduitee profile and update the information directly in the tabs without going through an Audit Order:
  - Certification Scope
  - Certification
  - Certificate
  - Files
  - Memos

Compulsory data/files submission (P&Cs)

The following must be completed in INTACT:

Creating the Audit Order

- Audit year
- Data Entry User
- Applicable Standard
- Audit Type
- Audit Format (if not onsite)
- Auditor Comment (if required)
- Sites (if required)
- Lead Auditor
- Audit dates and Times

Completing the Audit Order

- Checklist - not applicable indicators
- Checklist – Observations: complete grading and statement
- Checklist – Non-Conformities: complete grading, statement, corrective action, corrective action status, status date
- Files – upload Audit Report
- Files – upload CAP
- Files – upload other files when applicable
- Certification Scope – all applicable fields
- Certification – complete certification status, valid from date, valid until date, comment when applicable
- Certification – upload Certificate file (or Permission to trade), complete document reference number, issue date, valid from date, valid until date, services (applicable standard)

Compulsory data/files submission (CoC)

The following must be completed in INTACT:

Creating the Audit Order

- Audit year
- Data Entry User
- Applicable Standard
- Audit Type
- Audit Format (if not onsite)
- Auditor Comment (if required)
- Sites (if required)
- Lead Auditor
- Audit dates and Times

Completing the Audit Order

- Checklist - not applicable indicators
- Checklist – Non-Conformities: complete grading, statement, corrective action, corrective action status, status date, upload CAP
- Files – upload Audit Report
- Files – upload Signed Trade-Mark agreement when applicable
- Files – upload supporting documents & other files when applicable (Like sub-contracting agreement, 1 reviewed purchase and sale transaction, traceability exercise reviewed documents, volume reconciliation sheet, etc.)
- Certification Scope – all applicable fields
- Certification – complete certification status, valid from date, valid until date, comment when applicable
- Certification – upload Certificate file, complete document reference number, issue date, valid until date, valid until date, Services (applicable standard)

Changes in Certification Status – Additional Guidance

Granting a permission to trade

Only applicable to Producers who receive a Permission to Trade following their initial certification audit.

As per Better Cotton P&Cs Monitoring and Certification Requirements, a certification body may decide to grant a producer a temporary permission to trade following their initial certification audit.

This process enables the producer to start trading while correcting Incidental non-Conformities.

At the time the permission to trade is granted, the CB Admin **shall follow the normal audit/certification INTACT guidance, with the following exceptions:**

- **Checklist tab**: leave the applicable Incidental non-conformities open
- **Certification tab**: select "Permission to trade" status and enter the permission to trade validity dates
- **Certificate tab**: upload the "Permission to trade" document and enter the permission to trade validity dates (as well as other data points as per guidance)

The audit order must be finalised and reach the "Review finished" status as per guidance.

See next slide for guidance on capturing next stage in permission to trade process.

Closing a permission to trade – positive outcome

Only applicable to Producers who receive a Permission to Trade following their initial certification audit.

Once the certification body has verified that all relevant incidental non-conformities have been addressed by the Producer via a corrective actions, the Producer can receive their certificate (replacing the permission to trade).

The CB Admin **shall update the Producer record in INTACT as follow:**

- **Findings tab**: select open findings, update the corrective action plan, switch the findings status to closed and update the date the finding was closed.
- **Certification tab**: select "Certified" status and enter the certification validity dates
- **Certificate tab**: upload the certificate document and enter the certificate validity dates (as well as other data points as per guidance)

Note: Do not attempt to reopen the Audit Order – all updates are carried out by the CB Admin accessing directly the Producer profile from the Entity Search menu.

Closing a permission to trade – negative outcome

Only applicable to Producers who receive a Permission to Trade following their initial certification audit.

If, by the time the permission to trade expires, the Producer has not addressed the non-conformities, then a certificate cannot be issued.

The CB Admin **shall update the Producer record in INTACT as follow:**

- **Findings tab**: no action required
- **Certification tab**: select "Withdrawn" status, enter the date the certification was withdrawn.
- **Files tab**: upload a copy of the official communication to the Producer informing them their certification has been withdrawn. Categorise the file as "Other"

The certification body shall confirm to Better Cotton whether the contract with the Producer/ Programme Partner has been terminated or whether the contract is still valid for the Producer to re-apply for certification. This impacts the allocation of the Producer to the certification body in Salesforce (Better Cotton CRM system) and INTACT.

Note: Do not attempt to reopen the Audit Order – all updates are carried out by the CB Admin accessing directly the Producer profile from the Entity Search menu.

Recording a Suspension decision

As per Better Cotton P&Cs and CoC Monitoring and Certification Requirements, a certification body may decide to suspend a producer or a supply chain actor.

A suspension decision can occur as a result of a surveillance audit or a certification renewal audit. **An initial certification audit cannot result in a suspension decision.**

At the time the suspension decision is made, the CB Admin **shall follow the normal audit/certification INTACT guidance, with the following exceptions:**

- **Checklist tab**: leave the applicable non-conformities open
- **Certification tab**: select "Suspended" status and enter the suspension validity dates
- **Certificate tab**: do not update

The audit order must be finalised and reach the "Review finished" status as per guidance.

See next slide for guidance on capturing next stage in suspension process.

Lifting a suspension – cause successfully addressed

Once the certification body has verified that all relevant actions have been completed by the Producer/Supply Chain actor, the suspension can be lifted.

The CB Admin **shall update the Producer/ Supply Chain actor record in INTACT as follow:**

- **Findings tab**: select open findings, update the corrective action plan, switch the findings status to closed and update the date the finding was closed.
- **Certification tab**: select "Certified" status and enter the certification validity dates
- **Certificate tab**: (if applicable) upload the certificate document and enter the certificate validity dates (as well as other data points as per guidance)

Note:

- Do not attempt to reopen the Audit Order – all updates are carried out by the CB Admin accessing directly the Producer/ Supply Chain actor profile from the Entity Search menu.
- In some cases the Better Cotton P&Cs and CoC Monitoring and Certification Requirements require the certification body to carry out a full audit before lifting a suspension. If this is the case, the certification body must create a new audit order in INTACT and upload all applicable data and documents as well as updating the certification status and certificate information as part of that audit order.

Escalating a suspension – cause not addressed

If, by the time the suspension expires, the Producer/ Supply Chain actor has not addressed the cause of their suspension, then the certification is withdrawn.

The CB Admin **shall update the Producer/ Supply Chain actor record in INTACT as follow:**

- **Findings tab**: no action required
- **Certification tab**: select "Withdrawn" status, enter the date the certification was withdrawn.
- **Files tab**: upload a copy of the official communication to the Producer/ Supply Chain actor informing them their certification has been withdrawn. Categorise the file as "Other"

The certification body shall confirm to Better Cotton whether the contract with the Producer/ Programme Partner/Supply Chain actor has been terminated or whether the contract is still valid for the Producer/ Supply Chain actor to re-apply for certification. This impacts the allocation of the Producer/ Supply Chain actor to the certification body in Salesforce (Better Cotton CRM system) and INTACT.

Note: Do not attempt to reopen the Audit Order – all updates are carried out by the CB Admin accessing directly the Producer/ Supply Chain actor profile from the Entity Search menu.

Handling a certification decision appeal

A certification audit might result in a negative outcome:

- a new producer/ supply chain actor is denied certification or
- an existing producer/ supply chain actor's certificate is withdrawn.

In such cases, the producer/ supply chain actor might decide to appeal the certification decision by contacting the Certification Body within specific timelines.

The appeal might result in the Certification Body changing the original certification decision:

- a new producer/ supply chain actor's certification might be granted or
- an existing producer/ supply chain actor's certificate might be maintained.

To avoid the need to re-open the Audit Order in INTACT and amend findings and certification information, we recommend you not to finalise the Audit Order in INTACT until the appeal deadline has passed or the appeal decision communicated. i.e. you can start entering the audit results, but should pause before the review step, in case you need to modify a finding grading as a result of the appeal.

We also ask you to capture the occurrence / details of the appeal using a memo under the Memo tab, as well as uploading any applicable files under the Files tab.

If the appeal outcome requires you to modify the findings and/or the certification decision of an Audit Order you have already closed in INTACT, contact compliance@bettercotton.org to request for the Audit Order to be re-opened by our team. Include full details as to why this is necessary as well as AO reference number.

Navigation – Additional Guidance

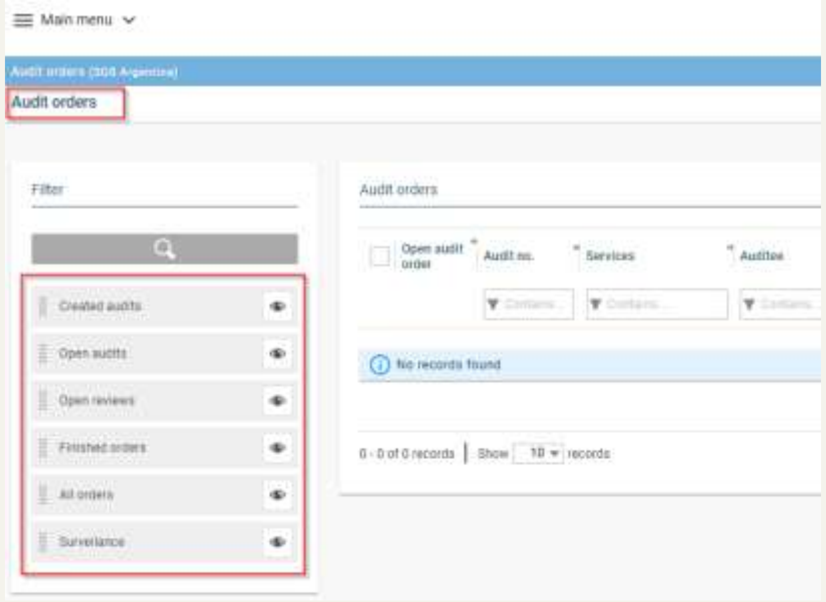
Start Screen – Audit Orders Overview

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.



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.
- You will see 3 tabs: "Company Administration", "Audit Management", "Audit Order Management"

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

Main Menu Tabs

Company Administration

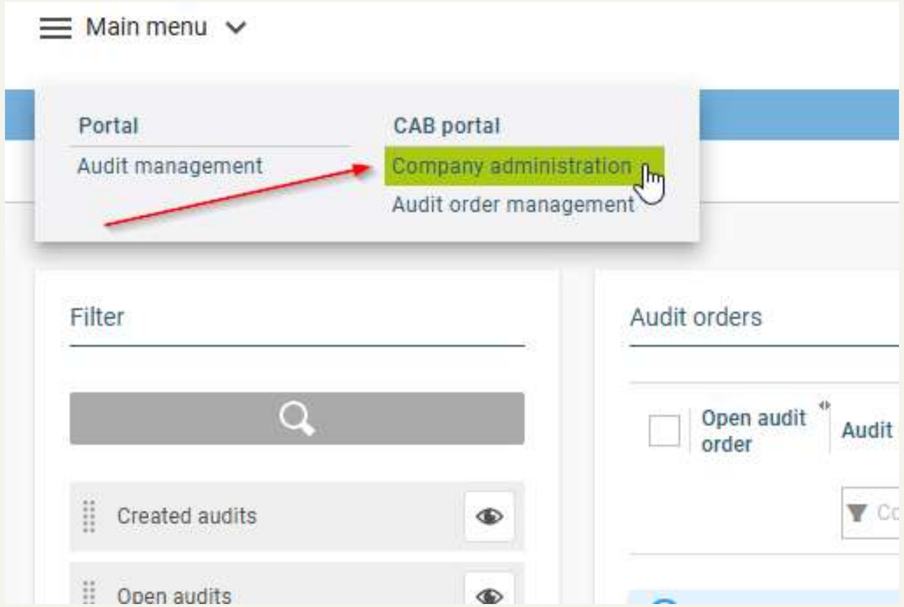
- Search and access auditee records (producers/supply chain actors)

Audit Management

- Used after creation of an Audit Order (AO)
- Edit and complete AOs
- View all AOs by status: *Open, Review, Finished*

Audit Order Management

- Provides an overview of all audit-related activities assigned to you
- (Refer to previous slide for detailed guidance)



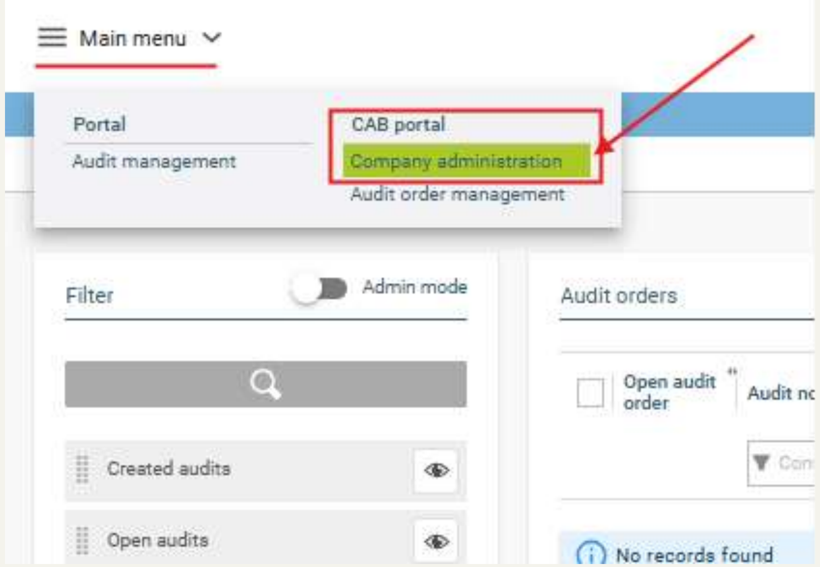
Find an Auditee

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

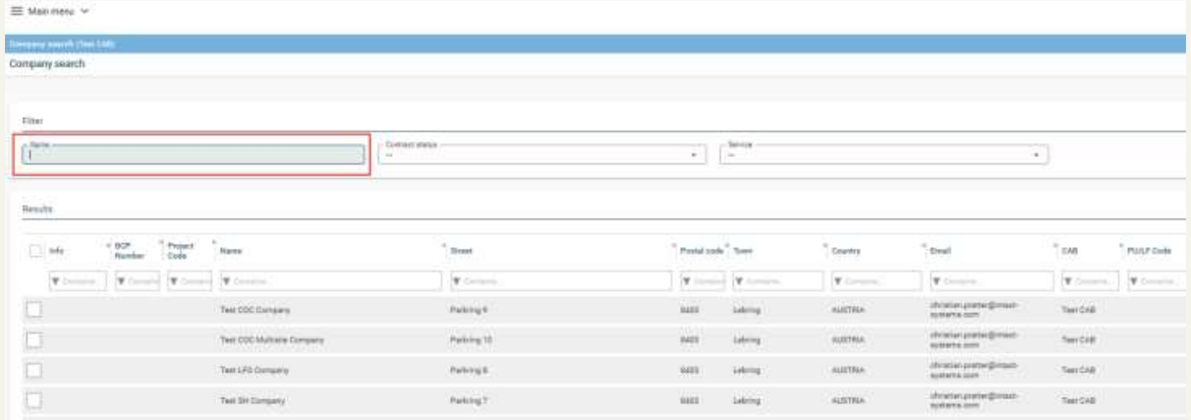
You cannot create new auditee accounts in INTACT: all new auditee accounts (both Producers and Supply Chain Actors) are created by Better Cotton in Salesforce.
Once a CB is allocated in Salesforce, the data is automatically pushed to Intact, where the auditee profile is created.

Open the Main Menu (☰)

Under CAB Portal, click on Company administration



The Company administration displays all Producers and Supply Chain Actors your CAB is responsible for.



Search options

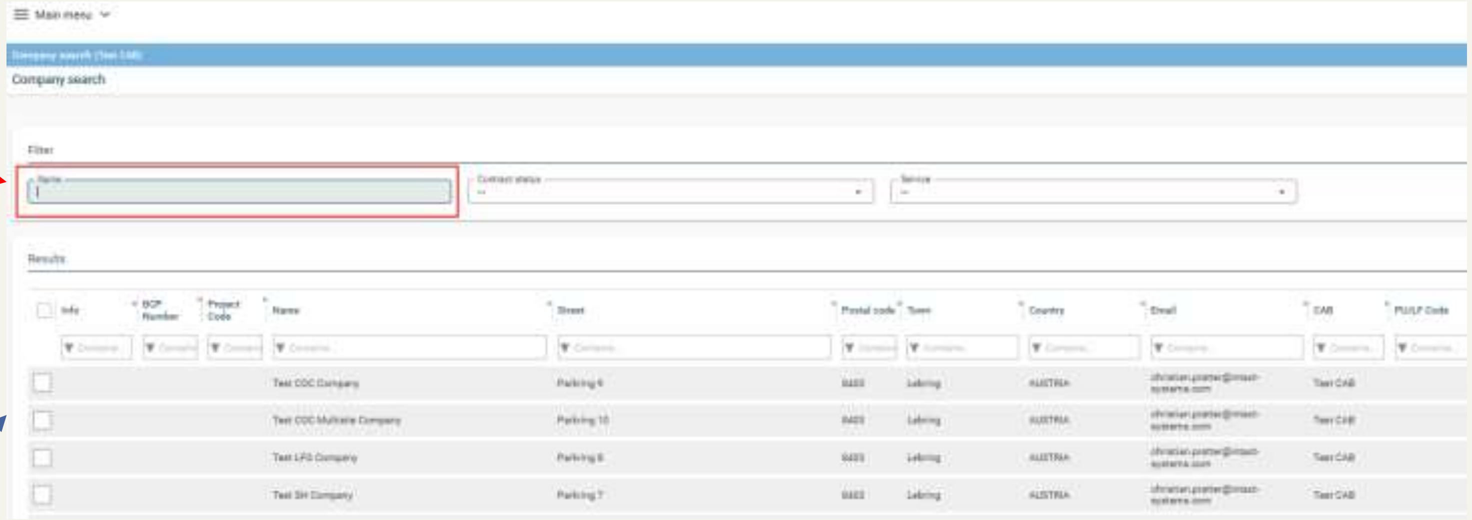
Fastest option: in the Name field, search for the auditee typing either:

- Their name (full or partial name)
- Their BCP or BCI number (depending on certification model)

Search Results are displayed in a table below showing key information such as:

- BCP number, Project Code, Name, Address, Country, Email and CAB Name

In the Results table, click a row to open the Auditee full profile page.

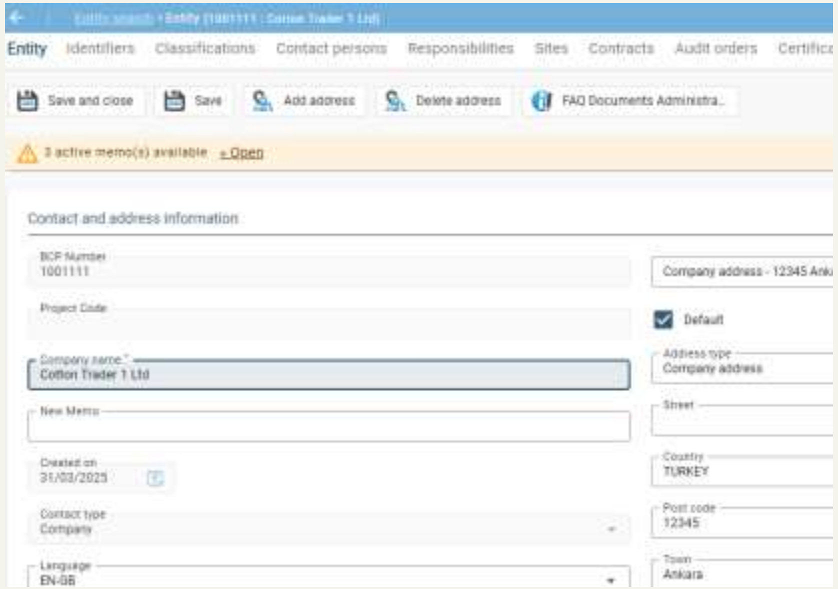


Tip: If multiple results, use the Filter fields to refine your search:

- **Contract Status:** Filter by status (Active)
- **Service:** Select the relevant standard (Principles & Criteria or Chain of Custody)

Comprehensive overview

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.

Identifiers Tab

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

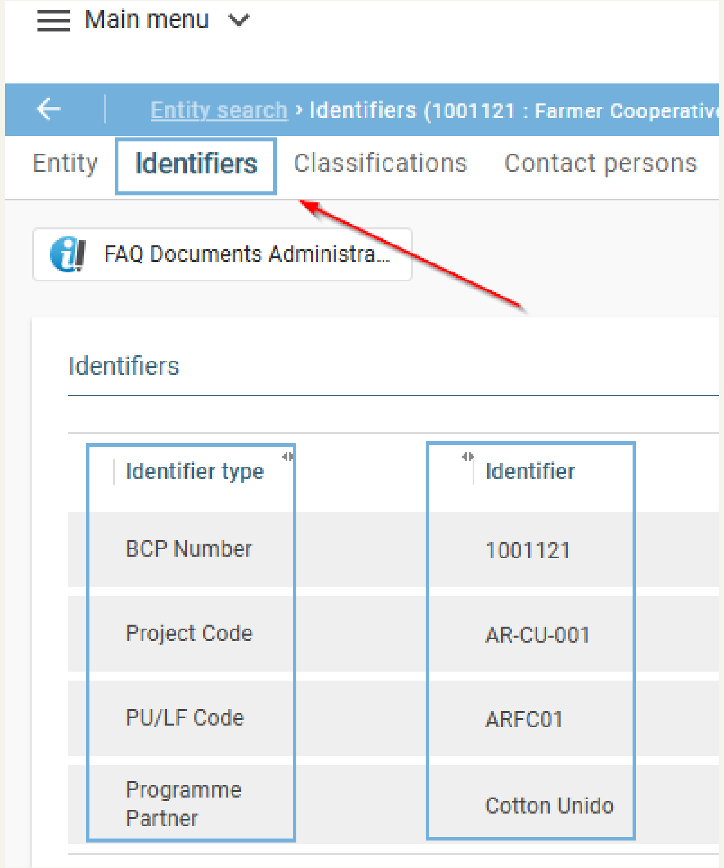
You see a list of identifiers with two columns:

- **Identifier Type:** 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.



Classification Tab

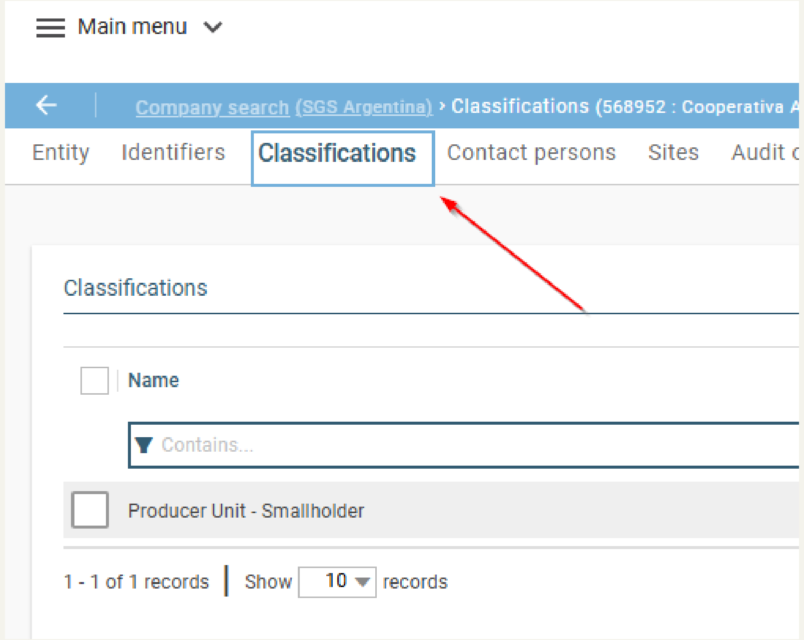
In the **Classifications** tab, the CB Admin can view the auditee's classification.

Examples of possible classifications include:

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

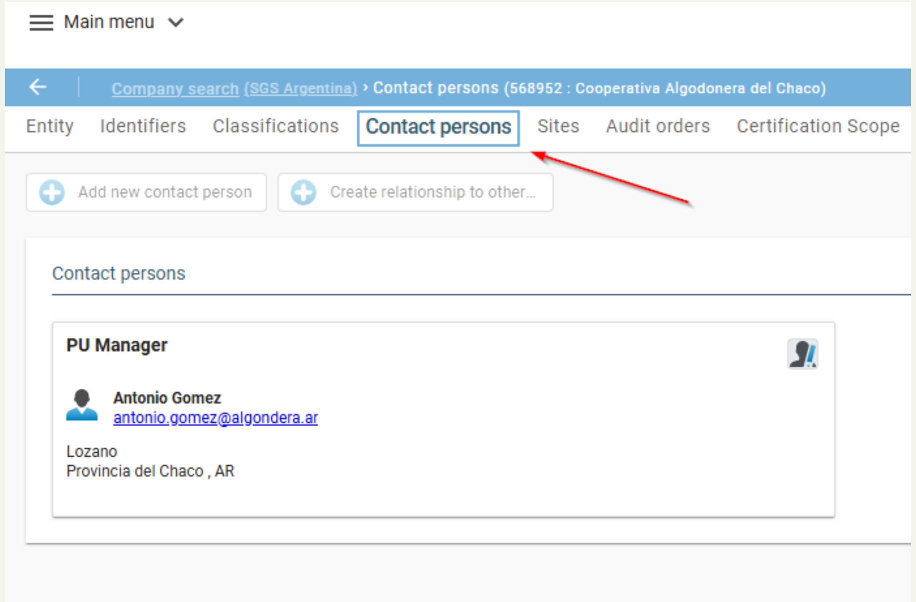
Click the **Excel export icon** (top-right corner) to download the Classification list.

Note: Classification cannot be edited by the CB Admin – the information comes from BCI CRM system (Salesforce).



Contact Persons Tab

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

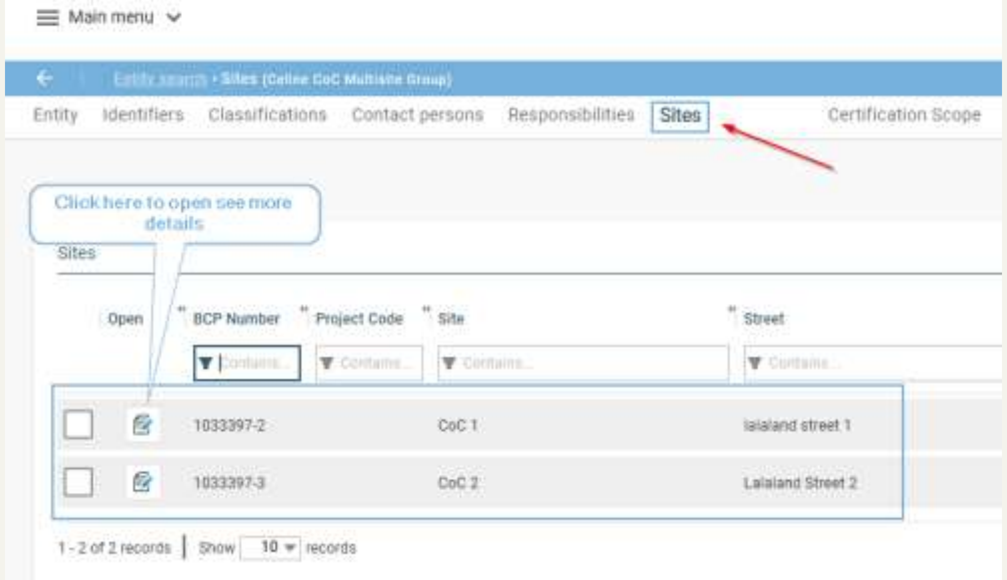
Quick Access: The small icon in the top-right corner of the contact card opens the Contact Entity in a new view — allowing CB Admins to view details.

Sites Tab

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

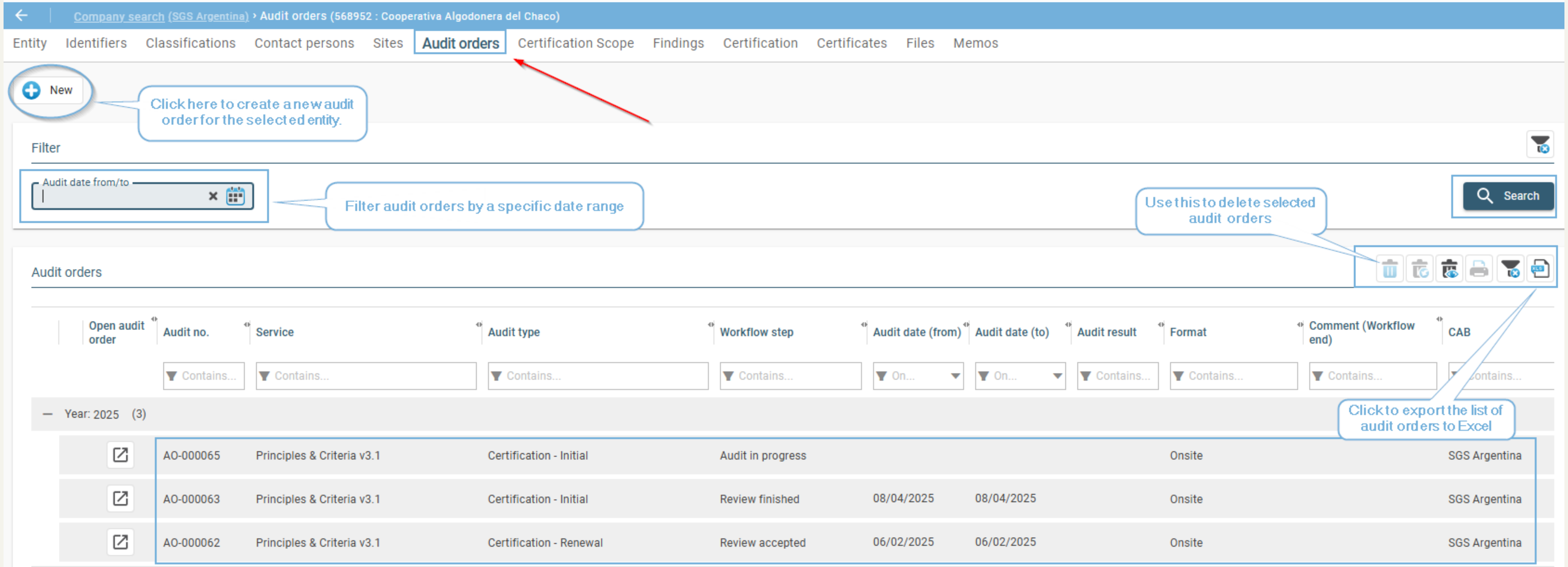
Export Function

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.

Audit Orders Tab

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).



Audit Orders Tab

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

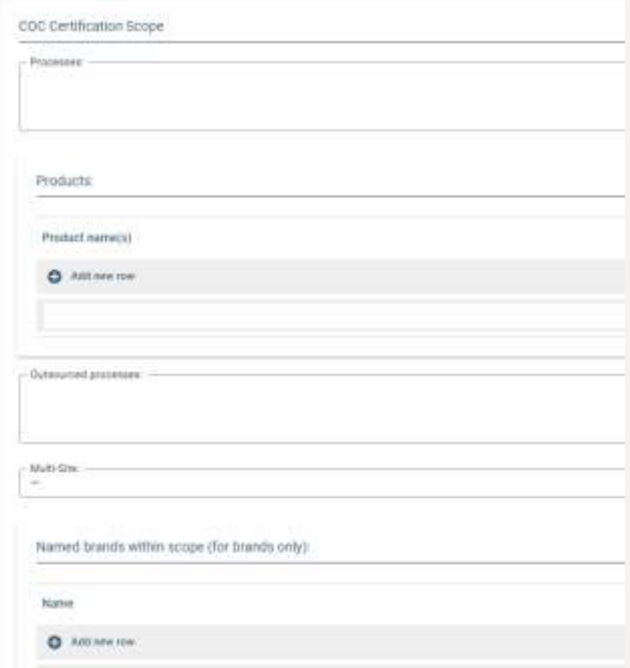
Tip: Use filters in each column (e.g., Audit Type or Service) for faster navigation.

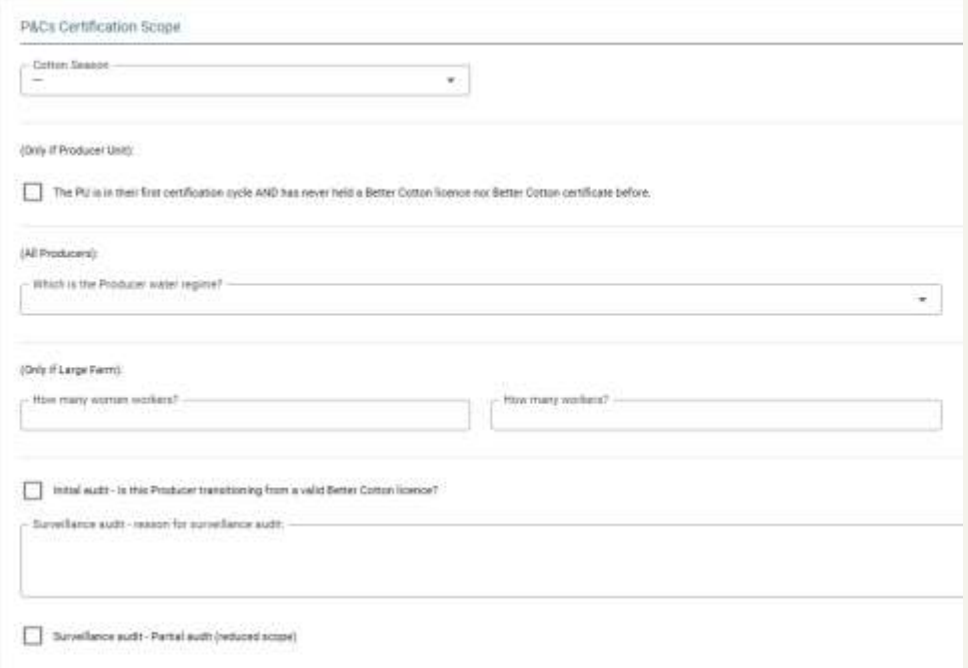
Certification Scope Tab

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.

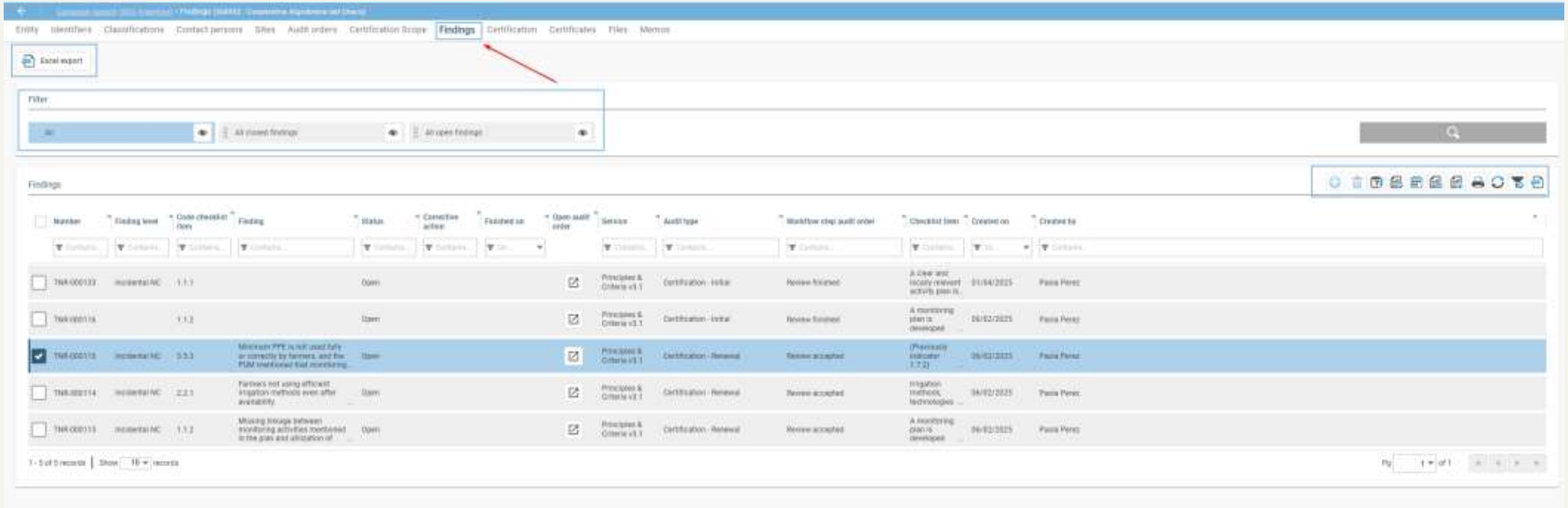
Note: the tab content differs depending if Auditee is a Chain of Custody actor or a Producer:



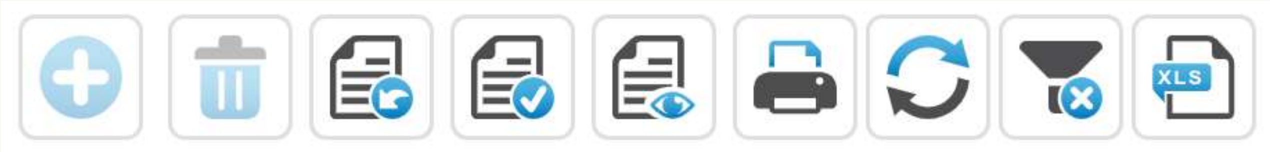


Findings Tab

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.



Findings Tab



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 an excel report for the selected finding.
- **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.

Findings Tab

Finding Levels

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

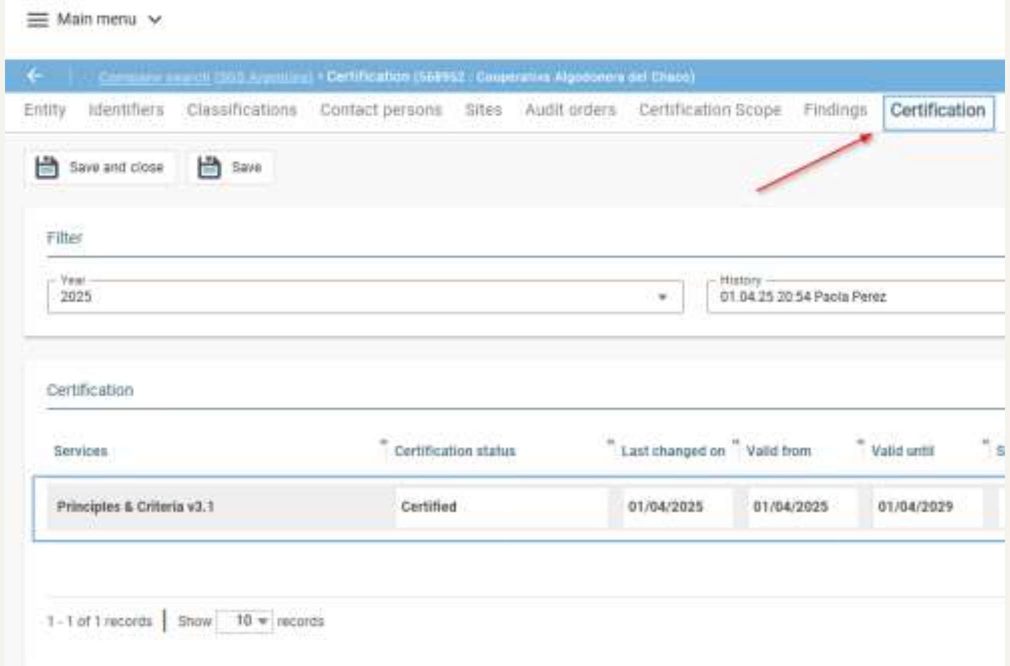
For more information on process to grade findings, please refer to Better Cotton Monitoring and Certification requirements https://bettercotton.org/what-we-do/certification/

Certification Tab

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



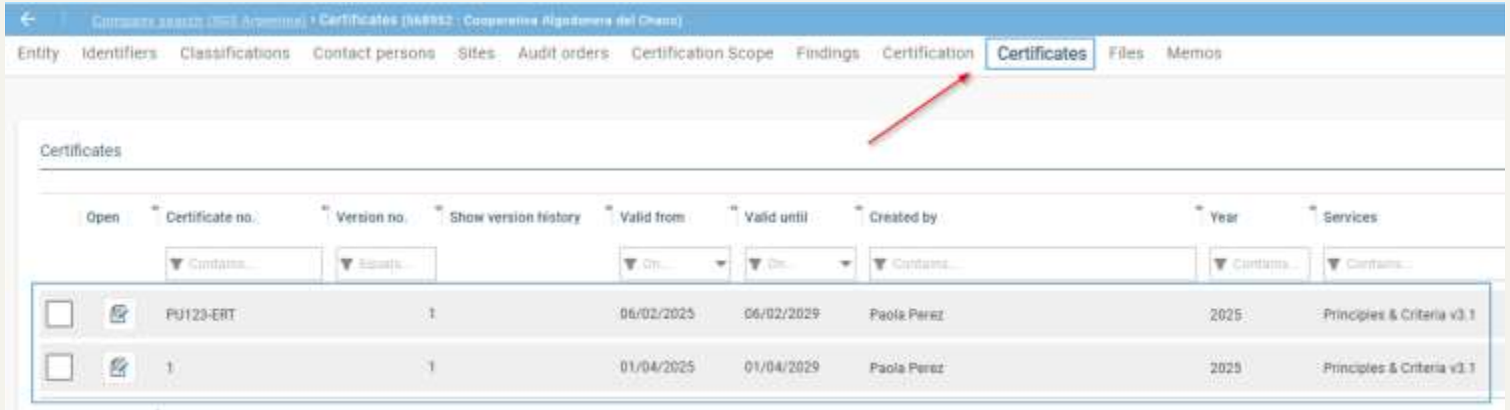
Certificates Tab

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

Note: For Producers, this tab might also include Permission to Trade letters, if such letter has been granted to a Producer during the early stage of the certification process.

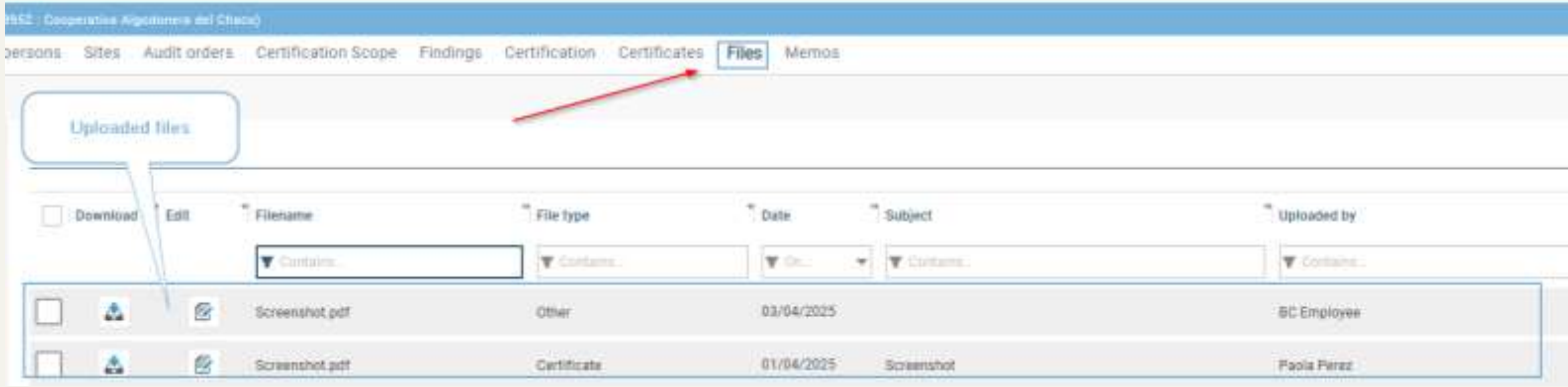


Files Tab

The **Files** tab displays all documents that have been uploaded for the selected auditee (either by a BCI staff or a Certification Body).

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

Note: 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

Files Types

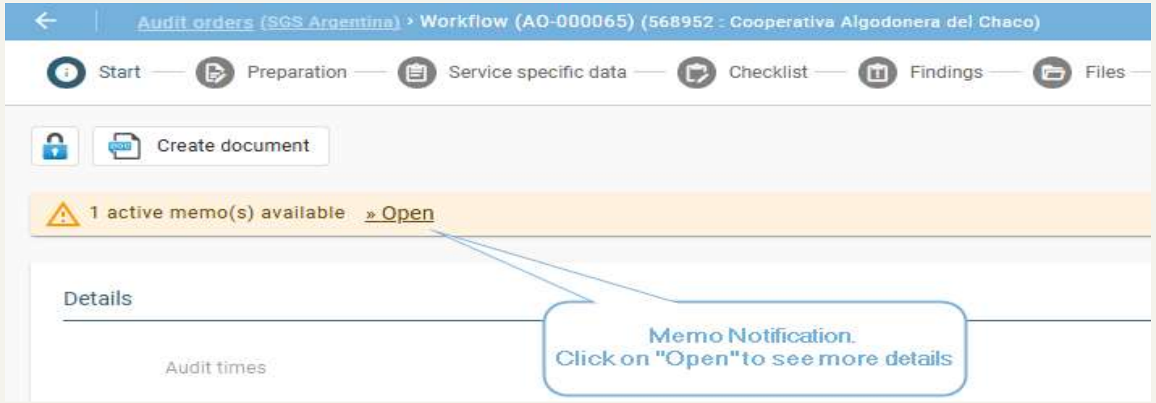
File Type	How to use for CoC audits	How to use for P&C audits
Audit Report	Final report sent to auditee (pdf format)	Final report sent to auditee (excel format)
Certificate	Official certificate document	Official certificate document
Corrective Action Plan (CAP)	Plan submitted to address identified non-conformities (excel format)	Plan submitted to address identified non-conformities
Farmers List	*Not applicable*	List of registered farmers
Finding Document	Complete audit report in excel format with supporting evidence	Document detailing audit findings and/ or evidence
Land Conversion Self-Declaration	*Not applicable*	Statement confirming land use compliance
Licensing/Surveillance Assessment Report	*Not applicable*	Evaluation report used during licensing or surveillance phases*
Producer Readiness Check Report	*Not applicable*	Assessment report for Producer readiness before certification*
PU Support Visit Report	*Not applicable*	Summary of findings and observation from a support visit*
RIR Document	*Not applicable*	Risk Identification report – used for internal or external review*
Self-Assessment Document	Supplier's own evaluation against applicable standards	Producer's own evaluation against applicable standards*
Signed Trade Mark Sub License Agreement	Agreement signed between the Certification Body and the auditee	*Not applicable*
Suspension	Notification document indicating suspension of certification	Notification document indicating suspension of certification
Other	Any document not covered by predefined categories	Any document not covered by predefined categories

Memos Tab

When opening an Audit Order, the CB Admin is notified if BCI 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

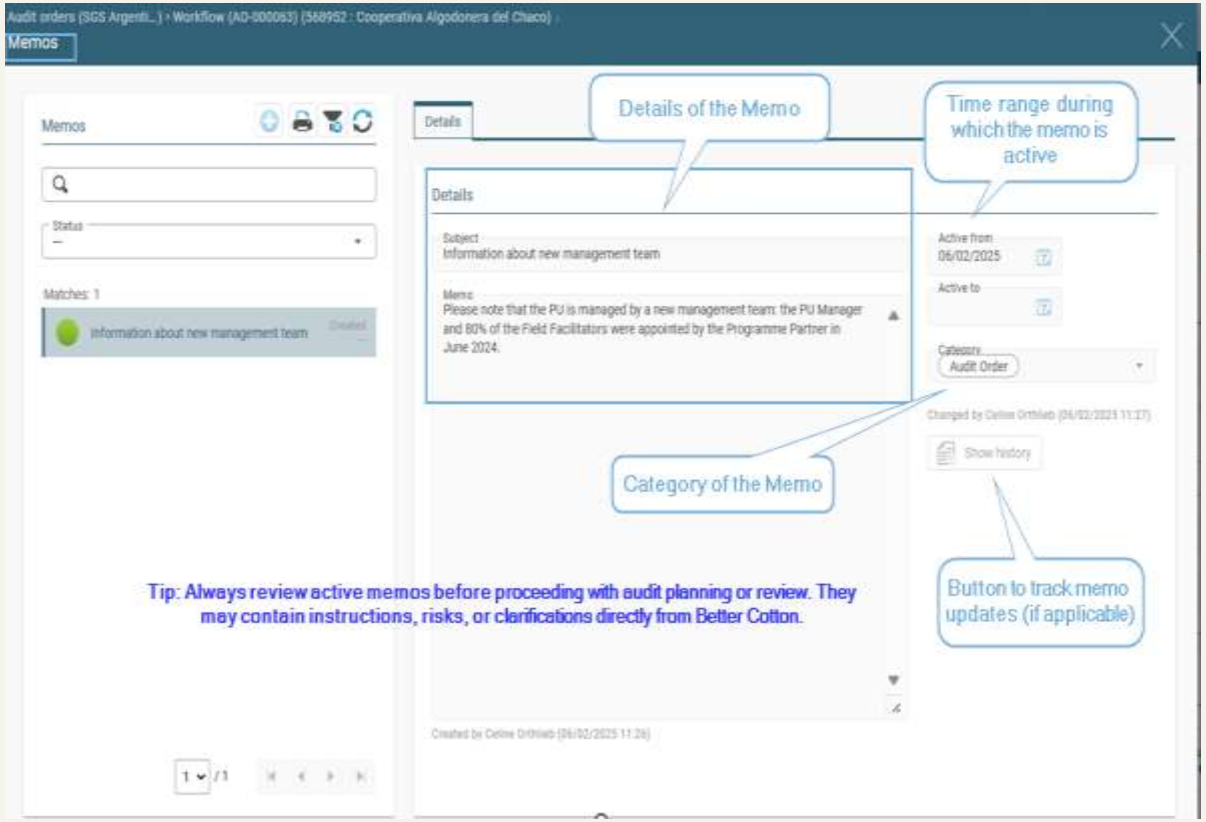


Memos Tab

“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.



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’.

Contact

For any questions or support, please reach out to: compliance@bettercotton.org

All requests are triaged via our helpdesk system.

When required, technical/admin issues will be escalated to our INTACT suppliers.