Peilaro user manual

How to work with Peilaro, from the first steps to every integration. The same text is in the help centre, where it is always up to date.

Contents

1. Getting started

1.1 Getting started

1.2 Help, the user manual and what's new

2. Your management system

2.1 Compliance per chapter

2.2 Describing how you comply

2.3 Implementation and proof

2.4 The document library

2.5 Word and PDF downloads

2.6 Statement of Applicability

2.7 Importing your management system

2.8 Own controls

2.9 Context and interested parties

2.10 Environmental aspects and impacts

2.11 Legal requirements and compliance checks

2.12 Asset register

2.13 New editions of a standard

3. Annual plan, evidence and follow-up

3.1 Evidence and the annual plan

3.2 Reminders and the weekly summary

3.3 For you

3.4 Findings

3.5 Risks

3.6 Objectives and KPIs
3.7 Internal audit programme
3.8 Management review
3.9 The change register
3.10 Complaints and customer feedback
3.11 Supplier evaluation
3.12 Access reviews
3.13 Emergency drills
3.14 Awareness and communication
3.15 Certificates and audits
3.16 Access for your auditor

4. Integrations

4.1 Integrations and the Microsoft 365 connection
4.2 The annual plan in your Outlook calendar
4.3 Linking SharePoint and OneDrive documents as proof
4.4 Alerts in Microsoft Teams
4.5 Findings in Microsoft Planner
4.6 Send evidence by email
4.7 Sign in with Microsoft Entra ID

5. Account and organisation

5.1 Your account and logging in
5.2 Your organisation
5.3 Members and roles
5.4 ISO roles

6. Access and subscription

6.1 Waiting list, early access and subscription
6.2 Extra standards
6.3 Cancelling your subscription
6.4 Read-only and removal

7. Privacy and your data

7.1 Downloading or deleting your data

1. Getting started

1.1 Getting started

Join the waiting list, choose your standards and invite your colleagues.

Peilaro starts on 1 April 2027. Until then you put your organisation on the waiting list with the form on the home page, below the frequently asked questions. Early access is by invitation: you then get an email with a link to choose your password, and your account is ready for you. Read more in the article Waiting list, early access and subscription.

Choose the standards you work with under Standards: ISO 9001, ISO 14001, ISO 27001 or a combination. Solo has one standard, Team up to three. Then open Compliance to see per chapter how you comply, or import your current management system under Import. The start page shows which first steps are done.

Every Monday you get a short summary by mail with what is due and overdue. Switch it off under General in the menu under your name.

If you work with colleagues, start a company under Organisation, in the menu under your name. Under Members you invite your colleagues. They get an email with a link that works for a week.

Switch on two-step login under Authentication, in the menu under your name. You then log in with your password and a code from an app on your phone.

1.2 Help, the user manual and what's new

Where to find answers, how to read or download the whole manual, and how you hear about changes.

Choose Help at the top of every page to open the help centre, in the language you use Peilaro in. Search on a word, or open an article. Each article links to the same article in the other language.

The user manual

The user manual holds every help article in one document, chapter by chapter, from the first steps to every integration. Read it online under User manual in the help centre, or choose **Download as PDF** to keep or print it. The Dutch and the English manual have the same chapters in the same order. The manual is made from the help articles themselves, so it always matches the help centre and the current version of Peilaro.

What's new

After a release with something you will notice, a short note appears once at the top of the app. Choose Read more for the details, or Close to put it away. The note does not come back after you close it, also not on your other devices. Every note stays on the What's new page of the help centre.

Still a question?

Email us at the address at the bottom of the help centre. Tell us which page you were on and what you tried; never send passwords or codes.

2. Your management system

2.1 Compliance per chapter

See per chapter of the standard how far you are, with evidence and open items.

Compliance is the first screen after you log in. Choose a standard at the top, or All for your whole management system.

Each chapter has one row: 4 Context, 5 Leadership, 6 Planning, 7 Support, 8 Operation, 9 Performance evaluation and 10 Improvement, and for ISO 27001 also Annex A.5 to A.8. Per chapter you see the share of clauses that is in place, how many are in progress, to do or excluded, how much evidence you recorded in the last 12 months, the open and overdue items and the linked risks. A word says how the chapter is doing, so you do not need to rely on colour.

Open a chapter to see its clauses as a tree. Each clause shows what the standard asks, its status, how you comply, who is responsible, the last evidence and when the next is due, the linked risks and when it was last reviewed.

Ready for the audit

Each chapter row and the top of a chapter show how far it is ready for the audit: the share of the applicable clauses that have both their implementation and their proof written down. Proof can be text, an original file or evidence. In a chapter, choose Missing implementation or proof under Show to see only the clauses that still lack one of them.

What the standard asks

Above how you comply, each clause shows what it asks. By default this is a short summary in our own words: the text of the standards is copyrighted, so Peilaro does not include it. You buy the standard itself at NEN: the button Buy this standard on the Standards page and on the overview of each standard and chapter takes you to the right page in the NEN webshop.

Does your organisation have its own copy with a licence that allows it, an owner or admin can add the official text of a clause on the clause screen with Add the official text. Only members of your organisation and the auditors you invite see it. It then shows instead of the summary, which stays

available below it.

On the Standards page, an owner or admin can record per standard the licence your organisation bought from NEN: the edition, the type of licence, the number of users, until when it is valid, and which members hold a seat. A seat cannot be given to more members than the licence covers, and a member who leaves loses their seat. In time, Peilaro will use these licences to show the official text only to the members with a seat on a valid licence. Everyone else then keeps seeing our summary, also once a licence has ended.

2.2 Describing how you comply

Write per clause how your organisation complies, once for every standard.

Open a clause from the overview and choose Edit. Set the status (in place, in progress, to do or excluded), choose who is responsible and the basis: risk analysis or best practice. An excluded clause needs a reason, which also goes in the Statement of Applicability.

How you comply and your proof are written in the block of the clause, below its requirement. See Implementation and proof. Saving text for a clause that is still to do sets it to in progress.

Chapters 4 to 10 have the same structure in ISO 9001, ISO 14001 and ISO 27001. A clause they share, such as 5.1 Leadership and commitment, is written once and shows under each standard you use. A change is visible everywhere at the same time.

Choose Mark as reviewed when you have checked a clause and nothing needs to change. The overview then shows today as the date of the last review.

Proof that is only valid for a while, such as a certificate or a yearly test, gets a date under Proof valid until. After that date the clause shows Proof needs review and no longer counts as ready for the audit. The person responsible gets a reminder fourteen days before, and once more when the date has passed.

Your texts are encrypted with a key of your own organisation.

2.3 Implementation and proof

Write how you meet a clause and what proves it, upload a Word or PDF file, and see which clauses are complete.

Every clause has one block with three parts, from top to bottom:

1. **Requirement**: what the standard asks, in our own summary. You read it, you do not change it.
2. **Implementation**: how your organisation meets the requirement.
3. **Proof**: what shows that it works, such as minutes, a signed policy or a report.

Open a chapter under Compliance and choose the plus in front of a clause to open its block right there in the tree. The same block is on the page of the clause.

Writing

Implementation and proof each have a small editor with headings, bold, italic, bulleted and numbered lists, links and tables. Choose **Save** to keep both parts at once. Below the block you see who changed it last and when. Until you save, the block says that there are changes not saved yet.

A clause that the standards share is written once and shows under each standard. Your texts are stored encrypted, with a key of your own organisation.

Uploading a Word or PDF file

Already have a procedure or a report? Choose **Upload Word or PDF** in Implementation or Proof and pick a .docx or .pdf file of at most 20 MB. Peilaro reads the text and puts it in the editor, so you can tidy it up before you save. Headings, lists, tables and links in a Word file come along; pictures and layout do not. The original file is always kept with the clause, under Original files, where you download or remove it. Removing a file leaves the text in the editor alone.

A PDF that is a scan has no text of its own. Peilaro then reads the scan on your own computer, in your browser, so the file does not go anywhere else for this. It reads at most the first 30 pages and tells you so when it stops there. Text read from a scan can contain mistakes, so check it carefully before you save. When even that does not work, the file is still kept as proof and you type the main points yourself.

How far a clause is

In the tree every clause shows how far it is written down:

- **Not started**: no implementation and no proof yet.
- **Partly written**: one of the two is there.
- **Implementation and proof**: both are there. A proof file or recorded evidence also counts as proof.

This way you see the gaps in a chapter at a glance. Choose Needs attention on a chapter to see only the clauses that need attention.

Read only

When your organisation is read-only, you can still read every block and download the files and the Word or PDF documents, but not change them.

2.4 The document library

Write a document such as a SWOT or a policy once, link it as implementation or proof to every clause it covers, and keep its versions, approval and review date.

Some documents belong to many clauses at once. Your SWOT analysis says something about the context of the organisation, about risks and opportunities and about the management review. In the document library you write such a document once and link it wherever it is needed. Change it in one place and every clause shows the new version.

Adding a document

Open **Documents** in the menu and choose **New document**. Give it a title and a type: context, policy, procedure, record or other. Write the text in the same editor as the implementation and proof of a clause, with headings, lists, links and tables. Choose **Create document** to keep it.

Do you already have the document in Word or PDF? Create the document first, then choose **Upload Word or PDF**. The text goes into the editor so you can tidy it up, and the original file is kept with the document under **Original files**. Save to keep the text. A scanned PDF is read on your own computer, page by page, so the scan never leaves it; check that text carefully. When a scan cannot be read, the file is kept and you type the main points yourself.

Every member can add, change and delete documents. The library is part of every plan.

Linking a document to a clause

Open a clause and look under **Implementation** or **Proof**. Choose **Link a document**, search the library by a word in the title and choose **Link**. The document shows as a small card with its title, type, version and approval. The title opens the document; **Unlink** takes the card away and leaves the document itself in the library.

Not in the library yet? Choose **New document** in the same place. Once you create it, it is linked to that clause right away and you are back on the clause.

A clause that several standards share shows its documents under each of them. On the document page, **Used in** lists every clause that uses it.

A linked document counts as written down: linked under implementation, the clause has its implementation; linked under proof, it has its proof. The badge in the overview per chapter follows this.

Versions and approval

Every save that changes the title or the text is a new version. **Version history** lists every version with who saved it and when; choose **Read version** to see an older one. An old version cannot be changed.

Owners and admins approve the current version with **Approve version**. The document page and the cards on the clauses then show who approved it and when. A later change makes a new version, which shows **Not approved yet** until it is approved again.

Who is responsible and the next review

Choose a member as **Responsible** and set the date of the **Next review**. Once that date has come, the responsible member gets a reminder by mail, once for that date. Without a responsible member, or when they are no longer a member, the owners and admins get it. Set a new date after the review, and the next reminder follows that date.

Deleting a document

Delete document asks first and says how many clauses use it. Deleting removes the document from those clauses as well, with all its versions and original files.

In your downloads and exports

When you download a clause as Word or PDF, its linked documents are listed with their type, version, approval and next review. An audit pack of a chapter or a whole standard adds the text of each linked document once, as an appendix at the end, and every clause names the appendix it is in. See Word and PDF downloads.

The library, with every version, link and original file, is part of your data export described in Downloading or deleting your data. Titles, texts and file names are stored encrypted.

2.5 Word and PDF downloads

Download a clause, a chapter or a whole standard as a Word document or a PDF, for your auditor or your own files.

You can download what you recorded as a Word document or a PDF. Both hold the same content.

One clause

Open a clause and choose Word or PDF at the top. The document has the number and title of the clause, the standard, the status, who is responsible and when it was last reviewed. Then what the standard asks, how you comply, your proof, the documents from the library linked to it (with their version, approval and next review), the attached files and the evidence you recorded.

What the standard asks is our own summary in plain words, not the text of the standard. If your organisation added its own copy of the official text, that copy is in the document too.

A chapter or a whole standard

On the page of a chapter, or of a standard, you download everything as one audit pack. It starts with a list of the clauses, and every clause follows on a page of its own. The text of each document from the library that the clauses link to follows once, as an appendix at the end; each clause names its appendix. This is useful to prepare for an audit or to keep a copy of your management system.

On the page of a standard you can also choose Choose chapters and tick the chapters you need, such as 9 and A.5 for one audit day. They come in one audit pack, in the order of the standard. With nothing ticked you get the whole standard.

Your logo

At the top of every download is your organisation's logo. Owners and administrators add it under Organisation, Logo for downloads: a PNG or JPG of at most 1 MB. Without a logo, the downloads show the name of your organisation.

Good to know

- The files themselves are not in the document. It lists their names, type, size, date and who added them. You open the files in the app.
- The document shows what was recorded on the day you download it.
- Downloading one clause works on every plan. The audit pack of a chapter or a whole standard is part of the Business plan.

2.6 Statement of Applicability

The controls of ISO 27001 Annex A with their applicability, reason and basis, as PDF or CSV.

The Statement of Applicability lists every control of ISO 27001 Annex A. Per control you see whether it applies or is excluded, the reason, the basis (risk analysis or best practice) and the status.

You change a control from the clause itself: open it and choose Edit. An excluded control needs a reason.

Download the statement as PDF for your auditor, or as CSV to work with it in a spreadsheet. The PDF of the statement is part of the Business plan.

2.7 Importing your management system

Bring the clause texts, evidence, risks and objectives of your current system along.

Owners and admins import an export of the current management system under Import. Choose the file (JSON) and check the summary before you confirm.

The import reads per standard the status, basis and text of each clause, the evidence that was recorded, and the risks, objectives, KPIs, extra controls and open items. Clauses that several

standards share are written once. Only the standards your plan allows are switched on.

Importing again updates what you imported before and adds what is new; nothing you added yourself is removed.

2.8 Own controls

Keep controls of your own next to those of the standards, with a status and how they are implemented.

Some organisations have measures that are not a clause of any standard, such as a rule of a customer or of your sector. Keep them under Own controls, in the menu under More.

Each control has a code, a name, a status (in place, in progress, to do or excluded) and a description of how it is implemented. Add, change and delete them on the same page. The extra controls from an ISOplanner export are imported here.

Own controls are stored encrypted with your organisation's key, like the rest of your management system, and are part of your data export.

2.9 Context and interested parties

Keep the issues around your organisation and the parties with a stake in it, and review them once a year.

Clauses 4.1 and 4.2 ask you to know your context: the issues inside and outside the organisation that affect what you want to achieve, and the interested parties with their needs and expectations. Under Context you keep both as two simple lists.

For an issue you record whether it is internal or external, a category such as climate, the market, laws or technology, a short description and its effect on the organisation. You can link it to a risk, so the issue and the way you handle it stay together.

For an interested party, such as customers, staff, neighbours or the authorities, you record what they need and expect, whether that becomes a requirement of your management system, how you deal with it and which standards it matters for.

Each entry has a review date a year ahead. When you have looked at it again, choose Mark reviewed and the next review moves a year on. Entries past their review date show under Needs attention on the dashboard. Clauses 4.1 and 4.2 link straight to the lists and show how many entries they hold.

2.10 Environmental aspects and impacts

Note what your activities do to the environment, score how serious it is and link the legal requirements that apply.

ISO 14001 asks you to know the environmental aspects of your activities and which of them are significant. Under Registers, choose Environmental aspects. The register shows when your organisation has ISO 14001 switched on.

For each aspect, note the activity (such as washing trucks), the aspect (such as waste water), its impact on the environment and when it happens: in normal running, out of the ordinary or in an emergency. Score severity and likelihood from 1 to 3. Severity times likelihood is the score; from a score of 4 the aspect is significant, and it shows a badge. Describe how you control it and tick the legal requirements that apply.

Under Show, choose Significant only to see the aspects that need your attention first.

2.11 Legal requirements and compliance checks

Keep the laws and permits that apply to you, check compliance at set times and raise a nonconformity when you do not comply.

ISO 14001 asks you to know your legal and other requirements and to check that you comply. Under Registers, choose Legal requirements. The register shows when your organisation has ISO 14001 switched on.

Add each requirement with its title, the source (such as a link to the law or the permit number), what it applies to and who keeps it. Set the date of the next compliance check: that person gets a reminder two weeks before, and once more when it has passed.

Compliance checks

Choose Checks on a requirement's row. Record the day you checked, whether you comply, partly comply or do not comply, and a note. When you do not fully comply, choose Raise nonconformity: Peilaro adds a nonconformity under Findings, owned by the person who keeps the requirement. The list of requirements shows each one's latest check.

2.12 Asset register

Keep your information, systems and other assets with their owner, classification and the risks that concern them.

ISO 27001 asks you to know what you need to protect and who is responsible for it. Under Registers, choose Assets. The register shows when your organisation has ISO 27001 switched on.

Add each asset with its type (information, software, hardware, a service, people or a location), its classification (public, internal, confidential or secret), its owner and where it is. Tick the risks that concern it; you keep the risks themselves under Risks. Filter the list on type.

Everything you write here is encrypted with a key of your own organisation.

2.13 New editions of a standard

See what changed in a new edition, which of your clauses to look at again, and how long your current certificate stays valid.

ISO revises its standards every few years. ISO 9001:2026 was published in September 2026 and ISO 14001:2026 in April 2026. A certificate to the previous edition stays valid for a transition period of about three years. Before it ends, your certification body checks in a transition audit, or at a recertification, that you meet the new edition.

The transition plan

When a new edition of one of your standards is out, the page of that standard shows a short notice with how many changes you reviewed. The dashboard also lists the transition under Needs attention until every change is reviewed. Choose See the transition plan to open it.

The plan shows:

- how many changes you reviewed so far
- the last day certificates to the previous edition are valid. When the accreditation bodies have not confirmed that date yet, Peilaro says it is expected and asks you to check it with your certification body.
- the transition or recertification audit you planned under Certificates, or a link to plan one
- each change, summarised in our own words, with a link to the clause it affects

Reviewing a change

Read the change, open the clause and adjust how you describe your way of working, your proof or your evidence where needed. Then choose Mark reviewed. Your name and the date are kept with the mark and the activity log shows it. Choose Undo to take the mark off again. Every member can mark changes.

Peilaro does not hold the text of the standards. Buy the new edition from NEN or ISO for the exact wording, and use the plan as a checklist next to it.

When the transition period has ended, the plan and the notice disappear.

3. Annual plan, evidence and follow-up

3.1 Evidence and the annual plan

Plan recurring checks per clause, get a reminder and close each task with what was done and the proof.

Under Annual plan you see every recurring check, such as the yearly management review or the quarterly access review, with the clause it belongs to, who is responsible and when it is due next.

Add a check with a name, the clause, how often it recurs (monthly, quarterly, every six months or yearly) and the first due date. Fourteen days before the due date the person responsible gets a reminder by email. A check can also follow an ISO role instead of a person: then whoever holds that role gets it. Without either, the holders of the role that owns the clause get it, and otherwise the owners and admins of your organisation. When a check is overdue, they get one more reminder.

Choose Close out when the check is done. Fill in what was done, who did it, when, who took part, the outcome and the follow-up, and attach the proof, such as minutes or a signed list. If there is nothing to follow up, tick No follow-up needed. Tick Add the follow-up as an improvement to put it under Findings, with the person responsible for the task, so it does not get lost.

Before the task closes, Peilaro reads a Word file or PDF and checks that it shows a date near the day it was done, an outcome or decision, and, for a meeting, review, audit or training, the names of the people who took part. When something seems to be missing, you see what. Add it and try again, or choose Close out anyway if the proof is fine as it is. The next due date moves on by itself. The overview counts the evidence of the last 12 months per chapter.

Owners and admins can also let the AI read the proof, under AI check of proof at the bottom of the annual plan. Only the text of the file and the form go to the AI service, with email addresses, numbers and postcodes masked. The AI's points are suggestions; check them yourself.

Under Evidence you find everything your organisation recorded, the latest first, with the clause, the note, who recorded it and the file. Filter on a standard, search by clause number or title, or show only the records with a file. Evidence imported from ISOplanner has no files; files appear when you add evidence on a clause. On a clause page you see the ten latest records, and Show all evidence opens the rest.

Files are stored encrypted in the European Union.

3.2 Reminders and the weekly summary

Which emails Peilaro sends about checks, findings and your week, and how to switch the summary off.

Peilaro emails you so nothing is forgotten. The emails go to whoever is responsible. If no one is named, they go to whoever holds the ISO role of the check, then to whoever holds the role that owns its clause, and otherwise to the owners and admins of your organisation.

Fourteen days before the deadline of a check in the annual plan you get a reminder. If the check is overdue, another one follows. A finding that passes its deadline gets a reminder too. Proof with a date it is valid until works the same way: a reminder fourteen days before that date, and one when it has passed.

Every Monday morning, each member of an organisation with a standard gets a short summary: the share of the clauses that is in place, how many checks are due in the next two weeks and how many are overdue, and how many findings are open and how many of those are past their deadline. It holds counts only, no text from your management system.

Switch the summary off under General, in the menu under your name. Reminders for checks and findings keep coming.

3.3 For you

Your own roles, tasks, proof to renew, nonconformities and the audits ahead, at the top of the overview.

At the top of the overview after you sign in, For you shows what is yours to do. Everyone sees their own list; the rest of the overview stays the same for the whole organisation.

- **Your roles**: the ISO roles you hold, such as the internal auditor. See ISO roles for what they mean.
- **Your tasks**: the checks of the annual plan that name you, or that follow one of your roles without naming anyone, which are overdue or due within the next 14 days.

- **Proof to renew for your clauses**: other checks on the clauses your roles own that are due soon, so you know the proof is being kept up to date.
- **Open nonconformities**: the nonconformities you own, and the open ones on the clauses your roles own.
- **Audits and reviews in the next 90 days**: the internal and external audits and the management reviews of the whole organisation. Those of your roles or your clauses are marked Yours.

Each list shows at most seven items and says how many more there are. The links take you to the clause, the annual plan or the findings. When a list is empty, there is nothing for you there right now.

3.4 Findings

Keep non-conformities, incidents and improvements with an owner, a deadline and a closing note.

Under Findings you keep non-conformities, incidents and improvements. Each finding has a type, a title, a description, the clause it concerns, an owner and a deadline.

A finding is open until you close it with a closing note: what you did and why it is solved. A finding past its deadline shows as overdue in the list and in the overview of its chapter, and its owner gets one reminder by mail. Without an owner, whoever holds the ISO role that owns its clause gets it, and otherwise the owners and admins.

Filter the list on type and on open or closed findings.

For a non-conformity, choose Corrective action to work through it step by step: what you did straight away, whether more is needed, the root cause, similar cases, the action itself, what you updated in your risks and system, and whether it worked. The steps follow your standards: with ISO 27001 you also update the information security risks and their treatment, with ISO 14001 you also deal with the environmental impact. Each step needs an answer, and the steps that show something was done need a file as proof; the files also appear under Evidence. When every step is done, the non-conformity closes on the day you checked that the action worked.

Incidents

For an information security incident (ISO 27001), choose the type Incident. You then also record when it happened, its impact (low, medium or high), whether personal data was involved and the day you reported it to the authority, if you did. When personal data was involved, check whether it must be reported to the Dutch Data Protection Authority within 72 hours. Choose Incident under the type filter to see only the incidents; each one shows these details under its title.

3.5 Risks

Score chance and impact at the start, now and as a goal, and link risks to clauses.

Under Risks you keep the risks of your organisation. Each risk has a code, a name, a description and how you deal with it.

Score chance and impact from 1 to 3 three times: at the start, now and as your goal. The level is chance times impact, so you see at once which risks are still above their goal.

Link a risk to the clauses and controls that address it. The overview counts the linked risks per chapter, and each clause shows its risks.

Risks and opportunities in one register

The same register holds opportunities: things that could turn out well, such as a new market or a better supplier. Choose Opportunity as the kind; you score it the same way. Under Show you see risks, opportunities or both. Opportunities do not count as risks above their goal on the overview.

Owner and review

Give each entry an owner and the date of its next review. The owner gets a reminder two weeks before that date and once more when it has passed. Without an owner, the owners and admins of your organisation get it.

Measures and what is still open

Each row shows the clauses and the Annex A controls the entry is linked to, and the open findings on those clauses and controls, so you see at once whether the measures are in place.

3.6 Objectives and KPIs

Set objectives, such as your CO2 goals, and keep a simple history of measurements.

Under Objectives you keep the objectives of your management system, such as lower CO2 emissions or a share of biofuel. Each objective has a name, a description, a status and optionally the standard it belongs to, a deadline and an owner: the member who looks after it.

Add KPIs to measure your progress: a name, a target and a unit. Record a measurement with its date and value, and see the history of each KPI as a list.

3.7 Internal audit programme

Plan internal audits over three years so every clause gets its turn, audit with a checklist and turn what you find into findings.

Every standard asks for internal audits at planned intervals that together cover the whole management system. Under Registers, choose Internal audits. It is there for every standard.

The programme

At the top you see three years of audits. Per year it shows the audits and how many clauses they cover. Below it, Peilaro counts the clauses of your standards that no audit in those years covers; choose Show the clauses to see them. Use Earlier years and Later years to move the three years.

Planning an audit

Choose Plan audit. Give it a title, the standard it audits (or all standards together for your integrated system), the date and the auditor. Choose the clauses it covers; without chosen clauses it covers every clause of its standard, or of all your standards. Change the status as the audit goes on. A cancelled audit does not count in the programme.

The checklist

Choose Checklist on an audit. Per clause you see what it asks, in our own words, and how your organisation says it complies. Record the result: conforms, observation, minor or major nonconformity, or not checked, with a note, and choose Save. For a nonconformity or an observation, choose Raise finding: Peilaro adds a nonconformity (for an observation an improvement) under Findings, linked to the clause and to the audit.

3.8 Management review

Hold the management review with an agenda Peilaro fills from your data, record the minutes and turn decisions into actions.

Every standard asks top management to review the management system at planned intervals, looking at a fixed set of inputs. Under Registers, choose Management reviews. It is there for every standard.

The agenda fills itself

Add a review with its date and choose Open. Peilaro fills the agenda from what you recorded since the previous review (for the first review, the twelve months before it):

- the changes in your internal and external issues and interested parties, from Context
- the results of the internal audits completed in that period
- the audits of the certification body held in that period and those still to come, from Certificates
- the nonconformities, incidents and improvements opened and closed, and what is still open or past its deadline
- your objectives and the latest measurement of each KPI
- your risks and opportunities, those above their goal and those due for a review
- for ISO 9001: complaints, feedback and compliments, and the supplier evaluations
- for ISO 14001: the significant environmental aspects, the compliance checks and the drills
- for ISO 27001: the access reviews, the accounts removed and the incidents with personal data

Minutes and decisions

Record who attended and the minutes, and set the status to Held. Add each decision with an owner and a deadline: it becomes an improvement under Findings, so it is followed up there and shows in the next review.

Download

Choose Word or PDF to download the review with your logo: the agenda, the minutes and the decisions in one document for your auditor.

3.9 The change register

Plan a change to your management system, have it approved by someone else, update the texts it touches and review it afterwards.

Under Change register in the account menu you plan each change to your management system before you make it, such as a new supplier, a move, a new system or a different way of working.

Choose Propose a change, say what changes and pick the requirements it touches. Then work through the steps: why you make the change, what could go wrong and how you prevent it, what it changes in your management system, what it needs and who is responsible. The steps follow your standards: with ISO 27001 you also look at the information security risks and test the security before going live, with ISO 14001 you also look at your environmental aspects.

Once every step is answered, an owner or admin who did not propose the change approves it. After the approval Peilaro lists the requirements the change touches, and shows which of their texts you have updated since. When the change is made, answer the last step, the review, and attach the proof. The change is then complete.

Everything is kept in the history of the requirements it touches, so an auditor sees who proposed, approved and reviewed each change and when.

Peilaro also suggests changes itself, for example when someone becomes an owner or admin or when your standards change. A suggested change is marked as such; check it, then work through its steps or delete it.

3.10 Complaints and customer feedback

Keep what customers tell you, how you handled it, and raise a nonconformity from a complaint in one click.

ISO 9001 asks you to listen to your customers and to act on complaints. Under Registers, choose Complaints and feedback. The register shows when your organisation has ISO 9001 switched on.

Record each complaint, other feedback or compliment with the day it came in, the customer, how it came in and what the customer said. Choose who handles it and, if it helps, the clause it touches, such as 8.2.1 on customer communication.

When it is handled, fill in the day it was closed and how it was resolved. Filter the list on kind and on open or closed.

From a complaint to a nonconformity

A complaint can show that something in your system does not work. Choose Raise nonconformity on its row. Peilaro then adds a nonconformity under Findings with the same clause, the same person and the complaint as its description. You follow it up there; the complaint shows that a nonconformity was raised.

Everything you write here is encrypted with a key of your own organisation.

3.11 Supplier evaluation

Keep your suppliers, score them on quality, delivery and communication, and get a reminder for the next evaluation.

ISO 9001 asks you to choose and evaluate the suppliers you depend on. Under Registers, choose Suppliers. The register shows when your organisation has ISO 9001 switched on.

Add each supplier with a category, a contact and whether it is critical: a supplier your products or services depend on. Critical suppliers come first in the list.

Evaluating a supplier

Choose Evaluations on a supplier's row. Score quality, delivery and communication from 1 to 5, choose the result (approved, approved with conditions or rejected) and add a note. Set the date of the next evaluation: the owners and admins of your organisation get a reminder two weeks before, and once more when it has passed. Only the latest evaluation of a supplier counts for the reminder.

The list of suppliers shows each one's latest evaluation and when the next one is due.

3.12 Access reviews

Check at set times who has access to each system, keep the evidence and get a reminder for the next review.

ISO 27001 asks you to review access rights at set times. Under Registers, choose Access reviews. The register shows when your organisation has ISO 27001 switched on.

Record each review with the system, the day, who did it, the scope (such as all accounts with admin rights), the outcome and how many accounts were removed. Set the date of the next review: the person who did the review gets a reminder two weeks before, and once more when it has passed. Once you record a newer review of the same system, the older one no longer sends reminders.

Evidence

Choose Evidence on a review's row to add one file, such as an export of the accounts. Adding another file replaces it. The file is stored encrypted with a key of your own organisation and is part of your data export.

3.13 Emergency drills

Practise your emergency scenarios, record how it went and turn the lessons into an improvement.

ISO 14001 asks you to prepare for emergencies and to test that preparation. Under Registers, choose Emergency drills. The register shows when your organisation has ISO 14001 switched on.

Record each drill with the scenario (such as a diesel spill in the yard), the day, who took part, how it went and the lessons. Set the date of the next drill of that scenario: the owners and admins of your organisation get a reminder two weeks before, and once more when it has passed. Once you record a newer drill of the same scenario, the older one no longer sends reminders.

When a drill has lessons, choose Raise improvement: Peilaro adds an improvement under Findings with the lessons as its description, so the follow-up is tracked there.

3.14 Awareness and communication

Ask your colleagues to read a message, check it with a short quiz, and keep a communication plan.

Clause 7.3 asks that people know the policy, their part in the management system and what happens when it is not followed. Clause 7.4 asks you to decide what you communicate, to whom, when and how. Under Awareness you keep both.

Campaigns

Owners and admins start a campaign: a title, a message written in the editor, a date by which everyone should have read it and, if you like, a short quiz of up to ten questions. For each question you give the options and choose the right answer, and you set the pass mark as the share of answers that must be right.

Every member then sees the campaign under To read on the dashboard. They open it, read the message and answer the questions, or confirm they have read it when there is no quiz. Below the pass mark they can read it again and try once more. Three days before the date, members who have not completed it get one reminder by mail.

Owners and admins see per member the number of attempts, the score and when they completed it. When the campaign is done, choose Close and keep as evidence. The figures, such as 12 of 14 completed, are then kept as evidence on clause 7.3, and members can no longer complete it.

Communication plan

The communication plan is a simple list. Each line says what you communicate, to whom, how often, through which channel, who is responsible and for which standards it matters. Every member can add and change lines.

Clauses 7.3 and 7.4 link straight to the campaigns and the plan and show how many entries they hold.

3.15 Certificates and audits

Keep your certificates, surveillance audits and recertification in view, with reminders and a list of what to have ready.

Under Certificates you keep the certificates your organisation holds: the standard, the certification body, the certificate number, the scope and the dates it is valid.

When you add a certificate, Peilaro can plan its cycle for you: a surveillance audit about 11 and 23 months after the certificate was issued, and the recertification audit 3 months before it ends. Every date can be changed afterwards, and you can add an audit yourself, for example an initial audit before you have a certificate, or a transition audit to a new edition of a standard.

For each planned audit Peilaro shows what to have ready: an internal audit and a management review in the last 12 months, no open nonconformities, no overdue checks and no clauses still to do. The coming audits also appear on your dashboard.

Owners and admins get an email 60 days and 14 days before an audit, and 90 days before a certificate ends when no recertification audit is planned yet.

3.16 Access for your auditor

Give an auditor read-only access to one or more standards for a limited time, with the proof they need on audit day.

The audit view shows one standard read-only: the chapters, and per clause how you meet it, the proof, the documents and files that go with it, the latest evidence and, for ISO 27001, the Statement of Applicability. Members use it from the Team plan to prepare an audit.

From the Business plan owners and admins also make a link for an external auditor under Auditor access. Choose one or more standards and until when the link works, at most 90 days. For a combined audit, one link covers all the standards you tick; the auditor switches between them at the top of the page. The auditor needs no account.

With The auditor may open files ticked, the auditor opens the evidence and the attached files one at a time in the browser. A whole pack cannot be downloaded through the link. Every file the auditor opens is noted in the activity log under the label of the link, so give each link a clear label, such as the name of the auditor. Untick it when the auditor should only read.

Links made before November 2026 keep showing what they showed: the figures and the dates of the evidence, without the texts or files. Make a new link to show more.

You can stop a link at any time, and you see when it was last used. Share the link only with your auditor: anyone with the link can read those standards until it ends.

4. Integrations

4.1 Integrations and the Microsoft 365 connection

Connect Microsoft 365 once for the Outlook calendar, SharePoint, Teams and Planner, see its status and disconnect it.

All integrations are on one page: Integrations, in the menu under your name. Each service has its own card with its status, the connected account, when it was last checked or synced, and a button to connect or stop it. Only owners and admins see and change this page.

Most integrations work through one Microsoft 365 connection for your organisation. You connect it once on the Microsoft 365 card at the top, and it serves the annual plan in Outlook, documents in SharePoint and OneDrive, alerts in Teams and findings in Planner.

Connecting

1. Open Integrations, in the menu under your name.
2. Choose **Connect Microsoft 365** on the Microsoft 365 card.
3. Sign in with a Microsoft account of your organisation and accept the permissions.

You come back to Integrations, and the card shows Connected with the account. Your Microsoft administrator may have to approve Peilaro for your organisation once. Then set up the services you want on their own cards.

When a new service is added later, the card says which one is not yet allowed. Choose **Connect again** and accept the new permissions. Nothing you set up is lost.

What data it uses

Peilaro keeps the name and address of the connected account and the keys Microsoft gives for the connection. They are stored encrypted with your organisation's key and are never written to logs. Peilaro asks Microsoft only for what each service needs:

- your basic profile, to show which account is connected,
- your calendars, to put the annual plan in one,
- the details of SharePoint and OneDrive documents you link as proof,

- the teams and channels you can choose for alerts, and posting in that channel,
- your Planner plans and tasks, and the names of colleagues to assign a task to.

What each service reads and sends is described in its own article. Peilaro checks the connection every night and renews it before it runs out.

When the connection expires

Sometimes Microsoft stops accepting the connection, for example after a password change or when an administrator withdraws it. The card then shows Expired with the date, and the owners and admins get an email. Choose **Connect again**. Nothing in Peilaro is lost in the meantime: the emails go out as usual, and the Outlook calendar is brought up to date once you are connected again.

Disconnecting

Choose **Disconnect** on the Microsoft 365 card. Peilaro removes its keys and stops every service that uses the connection. Events already in Outlook and tasks already in Planner stay where they are. Links to SharePoint and OneDrive stay on their clauses but are no longer checked. Your Microsoft administrator can also remove Peilaro's permission in Microsoft Entra ID. Connecting, disconnecting and expiry show under Activity.

4.2 The annual plan in your Outlook calendar

Put every check of the annual plan in an Outlook calendar, kept up to date by Peilaro, with an optional reminder.

Every check of the annual plan, such as an internal audit or the management review, can appear in an Outlook calendar. Your team then sees it next to their other appointments, and you do not have to keep two plans.

Connecting

1. An owner or admin opens Integrations, in the menu under your name, and connects Microsoft 365 on the card at the top. See Integrations and the Microsoft 365 connection.
2. On the card Annual plan in Outlook, choose a calendar: your own, or a shared one, such as a calendar for quality or the management team. Only calendars the connected account can

write in are listed.

3. Choose a reminder if you want one, for example two weeks before.
4. Choose **Put the annual plan in this calendar**.

Within a minute every check with a due date is in the calendar. The card shows the calendar, how many checks it holds and when it was last synced.

What you see in Outlook

Each check is an all-day event on its due date, shown as free so it does not block anyone's agenda. The event has the name of the check, the clause, who is responsible, the due date and a link to the annual plan in Peilaro. It is written in the language of the person who connected Microsoft 365.

Peilaro keeps the calendar up to date: a new check is added, a changed name, date or responsible person is updated, and a deleted check is removed. When you record evidence, the event moves to the next due date. This works one way only. Changes you make to the event in Outlook are not read back, and Peilaro may overwrite them at the next change. Every night Peilaro checks the whole calendar again.

What data it uses

Peilaro sends Microsoft the name of each check, its clause number and title, the name of the person responsible and the due date. In Peilaro it keeps only the calendar you chose, the reminder, and for each event the number Microsoft gave it and a fingerprint to see whether it changed. Nothing is read from your calendar except the list of calendars you can choose from.

Disconnecting

Choose **Stop** on the card Annual plan in Outlook. Peilaro removes its events from the calendar. To change the calendar or the reminder, choose another one and **Save changes**; the events move along. When you disconnect Microsoft 365 altogether, the events already in Outlook stay there, but they are no longer updated.

4.3 Linking SharePoint and OneDrive documents as proof

Show a document from SharePoint or OneDrive as proof for a clause, and see when a link stops working.

Many organisations keep their policies, procedures and records in SharePoint or OneDrive. You do not have to upload them again: link them to the clause they prove.

Connecting

An owner or admin connects Microsoft 365 under Integrations, in the menu under your name. The same connection serves the Outlook calendar, Teams and Planner. The SharePoint and OneDrive card on that page then shows Ready, and every member can link documents the connected account can open. Nothing else needs to be set up.

Linking a document

Copy the link of a document or folder in SharePoint or OneDrive (Share, Copy link) and paste it into the **Proof** of a clause. Peilaro turns it into a card with the name of the document, its kind and when it was last changed and by whom. Choose **Save** to keep the card in the proof.

Peilaro accepts links that start with https:// and point to SharePoint (sharepoint.com) or OneDrive (onedrive.live.com or 1drv.ms). Any other text or link is pasted as usual. Every member can link and remove documents. A clause that several standards share shows its links under each of them.

The name on the card opens the document in a new tab. **Check again** looks the document up now; **Remove** takes the card out of the proof. Removing a card never touches the document itself.

What data it uses

Through your organisation's Microsoft connection Peilaro reads only:

- the name of the document,
- the kind of file, such as Word, PDF, Excel or PowerPoint,
- when it was last changed and by whom.

Peilaro does not keep the content of the document. It only reads the content when you choose Import text (see below). Peilaro never opens the link you paste: it asks Microsoft about it, with your organisation's own connection. The name, the link and the author are stored encrypted.

Import text

The card of a Word (.docx) or PDF document that Peilaro can reach has **Import text**. Peilaro then reads the document through the Microsoft connection and puts its text in the proof, right below the card, so you can tidy it. Nothing is kept until you choose **Save**. The document itself is not stored in Peilaro: the link stays the proof.

- A PDF that is a scan has no text that can be read. Peilaro says so and adds nothing.
- A document larger than 20 MB is not imported. Copy the part you need from it instead.
- When the document cannot be opened, the card shows why.

When a link needs a look

Each link shows its status in words when Peilaro cannot reach the document:

- **No access**: the Microsoft connection cannot open the document. Check who it is shared with.
- **Not found**: the document was moved or removed. Remove the link and paste the new one.
- **Not connected**: your organisation has no Microsoft connection yet. The link is kept, without its name and date.
- **Connection expired**: an owner or admin connects Microsoft 365 again under Integrations.
- **Permission needed**: the Microsoft connection was made before it could read SharePoint. An owner or admin chooses Connect again under Integrations to allow it.
- **Not reachable**: Microsoft did not answer. Try again later.

Peilaro looks every link up again once a week. Choose **Check again** to do it now. The clause page shows how many of its links need a look.

In your exports

The links are listed in the Word and PDF downloads of a clause, a chapter or a whole standard, with their name, date and a link that can be clicked. They are also part of your data export described in Downloading or deleting your data.

Disconnecting

To remove one link, choose **Remove** on its card. When an owner or admin disconnects Microsoft 365, your links stay on their clauses, but Peilaro no longer looks them up: checking one again shows Not connected. Nothing in SharePoint or OneDrive is ever changed or removed by Peilaro.

4.4 Alerts in Microsoft Teams

Get the reminders about checks, internal audits and findings in a Teams channel as well.

Peilaro can post its reminders in a channel in Microsoft Teams, next to the emails. Your team then sees in one place what is coming up.

These alerts are posted: a check of the annual plan 14 days before its due date, and once more when it is overdue; a check for clause 9.2 is announced as an internal audit. A finding is posted when it passes its deadline. Each alert has a heading, the clause number and title, the name of the check, the date and a link to the clause in Peilaro. Each alert goes out once per due date.

Connecting

Everything is set up by an owner or admin under Integrations, in the menu under your name. First connect Microsoft 365 there, with the Microsoft 365 card at the top. Your Microsoft administrator may have to approve the Teams permissions. Then choose a team, a channel and the alerts you want under Alerts in Microsoft Teams, on the same page. You only see the teams the connected account is a member of. If the card asks you to connect Microsoft 365 again, the connection does not allow Teams yet: choose Connect again on the Microsoft 365 card and accept the Teams permissions.

Items that were already overdue when you chose the channel are not posted, so the channel does not fill up with old items. If an alert cannot be posted, for example because the connection has expired, the card shows when that happened. Peilaro tries again the next morning, and the emails go out as usual. A read-only organisation gets no alerts.

What data it uses

Peilaro reads the names of the teams and channels the connected account can see, so you can choose one, and keeps the names of the team and channel you chose, encrypted. In the channel it posts only what is listed above. A finding is posted with its type and clause only, never with its title or description. Peilaro does not read messages in the channel.

Disconnecting

Choose **Stop alerts** on the card to forget the channel. Alerts already posted stay in Teams. Disconnecting Microsoft 365 also stops the alerts.

4.5 Findings in Microsoft Planner

Give findings a task in Microsoft Planner, and close them there.

Does your team plan its work in Microsoft Planner? Then a finding can get a task there. You keep the finding in Peilaro; the task is where your colleagues pick it up.

Connecting

An owner or admin sets it up under Integrations, in the menu under your name. First connect Microsoft 365 there, with the Microsoft 365 card at the top. Then choose a plan and a bucket on the Microsoft Planner card, on the same page. Only plans the connected Microsoft account is a member of can be chosen. Also choose which findings get a task: non-conformities, incidents, improvements, or a combination. If the card asks you to connect Microsoft 365 again, the connection does not yet allow Planner: choose Connect again on the Microsoft 365 card.

How it works

A new finding of a chosen type soon gets a task in that bucket. The task has the finding's title, its deadline as the due date and a link back to Peilaro. When the owner's email address is known in your Microsoft 365, the task is assigned to them. For an open finding without a task, use Send to Planner under Findings.

Completing the task in Planner closes the finding in Peilaro within an hour, on the day it was completed, with a closing note that says who completed it. When the finding concerns a clause, Peilaro records evidence on that clause. Closing a finding in Peilaro completes its task, and opening the finding again sets the task back to not started.

Deleting a finding in Peilaro leaves its task in Planner alone. A task deleted in Planner is forgotten: the finding stays open in Peilaro.

What data it uses

Peilaro sends Microsoft the title and deadline of the finding and a link back, never its description. The title goes to Microsoft 365, so keep it free of personal details. To assign the task, Peilaro looks up the owner's email address in your Microsoft 365. It reads the plans and buckets you can choose from and, every hour, whether the tasks it made are completed and by whom. In Peilaro it keeps the names of the plan and bucket, encrypted, and the number of each task.

Disconnecting

Choose **Stop using Planner** on the card. New findings then get no task and nothing is kept in step any more. The tasks already made stay in Planner. Disconnecting Microsoft 365 also stops it.

4.6 Send evidence by email

Mail the clause number in the subject and the attachments become evidence for that clause.

Connecting

There is nothing to connect. Your organisation has its own address for evidence, such as bewijs+k7m2q9xd@peilaro.nl. You find it on the Evidence page, with a button to copy it. Every member can use it. Forward the report of an internal audit, for example, or a signed list from your scanner.

Put the clause number in the subject, such as "7.2" or "Evidence 7.2 internal audit". When your organisation works with more standards and a number means something else in each of them, add the standard: "ISO 27001 A.5.1", "27001 A.5.1" or "9001 8.5.1". A clause the standards share, such as 7.2 Competence, is filled in once and counts for every standard.

What data it uses

Each attachment becomes a separate piece of evidence for that clause, dated the day the mail came in, with a note of the subject and the sender. Without attachments we record one piece of evidence with only that note. We accept PDF, Word (docx), Excel (xlsx), PNG, JPG and attached mails (eml), up to 20 MB per file. Other files and images in the text of the mail are skipped.

Send the mail from the address you sign in with. Within a few minutes you get a reply: where the evidence is, or why it did not work, such as an unknown clause number. An organisation that is read-only cannot receive evidence by mail.

Attachments and the note are stored encrypted in the European Union, like evidence you add in the app. The mail is received on Peilaro's own mail server, never through Microsoft.

Disconnecting

Owners and admins can make a new address on the Evidence page, for instance when the old one was passed around too widely. The old address then stops working at once. Evidence already recorded stays on its clause; remove a record there if you no longer want it.

4.7 Sign in with Microsoft Entra ID

Link your organisation to its Microsoft tenant, so colleagues sign in with their work account.

Microsoft Entra ID is where your company keeps its Microsoft work accounts. With the Business plan an owner links your organisation to it once. Colleagues then use Sign in with Microsoft on the login page with their work account.

Connecting

1. Open Organisation, in the menu under your name.
2. Under Microsoft Entra ID, choose Link with Microsoft.
3. Sign in with your own work or school account of the company, not a personal Microsoft account.

What data it uses

Peilaro keeps the ID of your tenant and the domain of the address you signed in with, such as company.nl. The card shows them. At each sign-in Microsoft tells Peilaro the name, email address and sign-in name of the work account and the tenant it belongs to; Peilaro uses them to find the right account and keeps the link between the two. It never reads anything else from your Microsoft 365. A tenant can be linked to one organisation only. If Microsoft asks for approval by an administrator, ask your IT administrator to approve Peilaro for your company once.

Who signs in this way

A member signs in with Microsoft when the address or sign-in name of their work account is the address of their account in Peilaro. A Microsoft sign-in from your tenant never opens the account

of someone outside your organisation. Two-step login still asks for the code when it is on.

The two options

New colleagues from this tenant join automatically as member: someone from your tenant without an account gets one when they first sign in with Microsoft, and joins as a member. That only works while your plan has room for another member. They can choose a password later with Forgot your password.

Microsoft sign-in required: members and administrators whose address is in your tenant can no longer log in with a password. Their address is in the tenant when it ends in the linked domain, such as @company.nl, or when they signed in before with a Microsoft account of your tenant. The login page then asks them to use Sign in with Microsoft. Choosing a new password does not change this. Owners keep their password, so you can always get in.

Disconnecting

An owner can unlink at any time under Organisation. Below the Business plan the link stays but gives no access, and the requirement stops: everyone logs in with their password again. Both options then go off. Linking, unlinking and changed options show under Activity.

5. Account and organisation

5.1 Your account and logging in

Change your details, language and password, switch on two-step login and choose which emails you get.

Your own settings are in the menu under your name. They belong to you, not to your organisation.

General

Under General you change your name, email address, phone number and address. A new email address needs your current password and must be confirmed again with a link we send to it; the old address gets a message that it was changed. Here you also choose the language of Peilaro and its emails, Dutch or English, and whether you use Peilaro privately or for business.

The weekly summary arrives every Monday with what is due and overdue. Switch it off here if you do not want it. Reminders about your own checks and findings keep coming.

Password and two-step login

Under Authentication you change your password. You stay logged in on this device; every other device is logged out.

Two-step login asks for a code from an authenticator app on your phone, such as Google Authenticator or Microsoft Authenticator, as well as your password. Someone who learns your password then still cannot log in. Choose **Switch on**, scan the code with the app and type the code it shows. Keep the recovery codes somewhere safe: each works once, when you do not have your phone. An owner can require two-step login for everyone in the organisation.

Forgot your password? Choose Forgot your password on the login page. You get a link that works for a short while. Choosing a new password logs you out everywhere.

Signing in with Microsoft or Google

With the Business plan you can also link your Microsoft or Google account under Authentication and then sign in with it. Linked accounts are listed there and can be removed. When your

organisation is linked to Microsoft Entra ID, see Sign in with Microsoft Entra ID.

Working in more organisations

If you belong to more than one organisation, the menu under your name shows where you work now. Choose Switch organisation to move to another one. What you see and change always belongs to the organisation you work in.

To download your data or close your account, see Downloading or deleting your data.

5.2 Your organisation

Company details, the standards you work with, the logo for downloads, the processing agreement and the activity log.

Everything your organisation shares is set by its owners and admins, in the menu under your name.

Company details

Under Organisation you keep the name, KvK and VAT number, the invoice address and the email address for invoices. These details go on your subscription invoices. Members can read them; only owners and admins change them.

Standards

Under Standards you switch on the standards you work with: ISO 9001, ISO 14001, ISO 27001 or a combination. Solo has one standard, Team up to three and Business has no limit. Switching a standard off hides it, but keeps everything you recorded for it, so switching it on again brings it all back.

Logo for downloads

Your logo goes at the top of every Word and PDF download. Under Organisation, Logo for downloads, upload a PNG or JPG of at most 1 MB. Without a logo the downloads show the name of your organisation.

Data processing agreement

A company accepts the data processing agreement once: the agreement on how we process personal data for you. An owner or admin reads and accepts it under Organisation. When there is a new version that needs accepting again, it says so there. A smaller update only shows a notice once, which an owner or admin can close.

Security

The owner can require two-step login for every member under Organisation, Security. Switch it on for yourself first, under Authentication. Members who do not use it yet are asked to set it up before they can continue. Here the owner can also link the organisation to Microsoft Entra ID; see Sign in with Microsoft Entra ID.

Activity

From the Team plan, owners and admins see under Activity who did what: members invited or removed, roles changed, settings and integrations changed, and the main changes to the management system. Activity shows names and numbers, never the content of your texts. Lines older than two years are removed.

5.3 Members and roles

Invite colleagues, give them a role and require two-step login.

If you work with colleagues, start a company under Organisation, in the menu under your name. You become its owner. Your own account stays as it is.

Under Members, owners and admins invite a colleague with an email address and a role. The colleague gets an email with a link that works for a week. Without an account yet, they create one with that link. You can withdraw a pending invitation; inviting the same address again sends a new link.

There are three roles. An owner also manages the subscription and can make other members owner. An admin manages the organisation, the members, the standards and the import. A member works in the management system. A company always has at least one owner.

How many members you can have depends on your plan: Solo is for one person, Team for up to ten members and Business has no limit. At the limit, you can only invite someone once there is room or

after choosing a larger plan.

Under Organisation, the owner can require two-step login for every member. Switch it on for yourself first under Authentication.

To leave yourself, choose Leave under Members. A member who is removed is logged out everywhere at once. If someone then belongs to no organisation for 30 days, we close their account.

From Team, owners and admins see under Activity who did what, such as inviting members, changing roles or cancelling the subscription.

5.4 ISO roles

Decide who is the management representative, the internal auditor and the other roles, which clauses they own and which tasks they have.

The standards expect you to know who looks after what. In Peilaro that is an ISO role, such as the management representative or the internal auditor. A role owns clauses and has recurring tasks. It is not an access right: what someone may do in Peilaro still comes from their role as owner, admin or member under Members.

You find the roles under your name, at ISO roles. Every member sees who holds which role. Owners and admins add, change and give them.

Start with the suggested roles

When there are no roles yet, choose Add the suggested roles. Peilaro adds the roles that fit the standards you have switched on:

- the management representative, with the management review once a year (clause 9.3) and the certification or surveillance audit;
- the internal auditor, with the internal audit once a year (clause 9.2);
- the process owner, with a process review every six months (clause 8.1);
- with ISO 27001, the information security officer, with the access rights review every six months and the risk assessment once a year;

- with ISO 14001, the environmental coordinator, with the evaluation of compliance obligations and the review of environmental aspects.

The suggestions use clause numbers and our own words, never the text of the standard. You can change everything. Switched on another standard later? Choose Add the suggested roles again: only the roles that are new are added.

You can also add a role of your own, with a name, a short description and the clauses it owns. A chapter covers every clause in it.

Give a role to a colleague

Under a role, choose Change who holds it and tick the colleagues. A role can have more than one holder.

When a role gets its first holder, its tasks go on the annual plan as checks that follow the role. Nobody is named on such a check, so the reminder goes to whoever holds the role at that moment. When someone leaves your organisation, their roles go back and the tasks go to the other holders.

A role that nobody holds shows as Nobody yet, on this page and under Needs attention on the overview. Its reminders go to the owners and admins until someone has it.

Conflicts of interest

Someone who audits should not audit their own area or their own work. Mark a role as Independent for that, as the internal auditor is. Peilaro then warns you when the holder:

- also holds a role that owns the same clauses, or
- wrote how one of those clauses is met, or is responsible for it.

Giving the role anyway is possible in a small team: tick that you go ahead and write a short note why, for example that an external auditor checks this area. The note stays with the role and is logged. An internal audit on the annual plan shows the same warning when the person doing it owns the clause.

Who gets the reminders

A reminder about a check goes to the member named on it. Without one, it goes to whoever holds the role of the check, then to whoever holds the role that owns its clause, and otherwise to the

owners and admins. Findings without an owner follow the role that owns their clause in the same way.

6. Access and subscription

6.1 Waiting list, early access and subscription

Peilaro starts on 1 April 2027. Until then you put your organisation on the waiting list; early access is by invitation.

Peilaro starts on 1 April 2027. Until then you cannot sign up yourself yet, and there is no trial. Put your organisation on the waiting list with the form on the home page, below the frequently asked questions. You get an email to confirm your address. After that you hear from us as soon as you can begin, and whether the launch offer still applies.

Early access is by invitation. We invite some of the organisations on the waiting list to use Peilaro before the start. You then get an email with a link to choose your password; the link works for 7 days. Your account and organisation are ready for you. The email says what you get, for example Team free until 1 April 2027 and the launch discount on your first year.

When your free access ends, choose a plan under Subscription, in the menu under your name. If you choose nothing, your organisation becomes read-only. Read more in the article Read-only and removal.

Under Subscription, the owner chooses Solo, Team or Business, yearly or monthly. A year costs the same as ten months. Because an ISO year runs from audit to audit, the yearly price comes first: as an amount per month, with what the year costs below it. The Monthly button shows the monthly prices. You pay the first time with iDEAL; after that Mollie collects the amount automatically every period. The prices are a fixed price per organisation, excluding VAT.

From the start on 1 April 2027, the first 50 organisations that take out a plan get 25% off their first year. The website shows how many places are left.

Moving to a larger plan starts right away and you pay the difference for the rest of the period once. A smaller plan starts on your next billing date. You find your invoices under Subscription invoices.

With a yearly plan you get an email a little over a month before it renews.

If a payment fails

If Mollie cannot collect a payment, the subscription keeps running and the organisation gets an email right away. The owner then has 14 days to pay. Under Subscription, Pay now collects the amount again, or opens Mollie's payment page to set a new payment method. Is the payment made in time, then nothing changes. If not, the subscription ends after 14 days and your organisation becomes read-only. Choosing a plan again opens it.

6.2 Extra standards

Add a standard beyond your plan for a fixed amount per standard, from your next payment.

What your plan includes

Solo includes one standard, Team three and Business every standard. With a paid subscription you can switch on more standards than your plan includes, as extra standards. Solo goes up to three standards in all this way. Team can use extra standards once Peilaro supports more than three standards. Business needs none.

What an extra standard costs

An extra standard costs a fixed amount per standard, excluding VAT: per month on a monthly plan and per year on a yearly plan. You see the amount under Standards before you switch anything on.

Switching one on

The owner or an administrator chooses the standards under Standards and saves. When the choice needs an extra standard, Peilaro first shows what it costs and from when. After you confirm, you can use the standard right away. The amount is added to your subscription from your next payment, as a separate line on the invoice; the days before that are not charged.

Switching one off

Switch the standard off under Standards. The amount stops from your next payment. Everything you recorded for the standard stays, and you see it again when you switch it back on.

Complimentary plans and cancelling

With a complimentary plan from us you keep the standards your plan includes and cannot add extra ones.

When you cancel your subscription, the extra standards end with it: the standards stay on until the subscription ends, and a new subscription asks you to confirm again.

6.3 Cancelling your subscription

Go to Subscription in the menu under your name and choose Cancel subscription.

Go to Subscription in the menu under your name and choose Cancel subscription. You first see until when your subscription runs, and whether anything is refunded. Your subscription runs until the end of the paid period. After that your organisation is read-only for a year: you can still view and download everything, and with a new plan you carry on where you were. Read more in the article Read-only and removal.

Are you a consumer and do you change your mind within 14 days after subscribing? Then use the button Withdraw from the contract here under Subscription.

6.4 Read-only and removal

What happens when your organisation no longer has free access or a plan.

When your free access or your plan ends and you choose no new plan, your organisation becomes read-only. The top of every page then says since when, and until when your data is kept.

Read-only means you can still view and download everything, but cannot add or change anything. You download your data under General, in the menu under your name. Owners and admins also download the management system with its files there.

Your organisation stays read-only for a year. If you choose a plan under Subscription during that year, you carry on where you were.

After that year we remove the organisation with its management system, files and members. The owners get an email 30 days and 7 days before. Members who then belong to no other organisation are closed after 30 days. If your organisation has invoices, we keep only its name and address with those invoices, as long as the law requires.

If you do not want to wait, you can close your account yourself under General when you are the only member, or email us.

7. Privacy and your data

7.1 Downloading or deleting your data

Under General you download all your data and close your account.

Go to General in the menu under your name. There you download all your data in a ZIP file.

On the same page you close your account, with your password. If you are the only owner of a company with other members, make someone else owner first.