

BizApp360 Legal Document System Master Pack

BizApp360 (Pty) Ltd | Registration Number 2024/605478/07 | Tax Number 9011061323

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This master pack contains professional draft templates and implementation guidance for the BizApp360 SaaS legal document system.

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01 Terms and Conditions BizApp360

Terms and Conditions

BizApp360 (Pty) Ltd | BizApp360.com

Title	Terms and Conditions
Category	Website and Platform Legal
Version	1.0
Effective Date	2026-05-22
Status	Draft
Attorney Review Required	Yes
Visibility	Public
Acceptance Required	Yes
Owner	BizApp360 (Pty) Ltd
Contact	Admin: admin@bizapp360.com Support: support@bizapp360.com Accounts: accounts@bizapp360.com

1. Purpose and Scope

This document applies to all use of BizApp360.com and related websites, applications, portals, marketplaces, APIs, support channels, onboarding workflows, trial accounts, paid subscriptions, white-label instances, and client portals operated by BizApp360 (Pty) Ltd.

Company details: Registration Number 2024/605478/07; Tax Number 9011061323; Address: Remote-operated business, South Africa; Telephone: +27 73 128 4112; Email: admin@bizapp360.com.

These Terms and Conditions govern access to and use of the BizApp360 platform. By creating an account, activating a trial, accepting an invitation, using a client portal, using an API key, publishing a marketplace profile, or otherwise accessing the services, the user agrees to these Terms and all incorporated policies.

2. Definitions

- Account means a registered user, tenant, workspace, client portal profile, marketplace profile, or administrative login.
- Tenant means a customer workspace, company environment, white-label instance, or branch environment within BizApp360.
- Customer Data means information, documents, job cards, photos, signatures, invoices, quotes, staff records, stock data, client records, accounting records, support tickets, routes, files, integrations, and other data submitted into the platform.
- Marketplace means any public listing, discovery, contractor profile, verification, quote request, review, lead-generation or public-facing business directory feature.
- Services means the software, website, platform, mobile interfaces, APIs, integrations, support, marketplace, legal document acceptance system, and related services.

3. Account Registration and Authority

The person registering confirms that they have authority to bind the company, contractor, branch, facility group, marketplace seller, or tenant being registered. BizApp360 may request verification, company registration details, tax details, identity confirmation, role confirmation, or supporting documentation before approving access.

- Users must provide accurate information and keep it updated.
- Users are responsible for maintaining confidentiality of passwords, MFA credentials, API keys, and invite links.
- The customer is responsible for all activities under its tenant unless caused directly by BizApp360's proven wilful misconduct.

4. Platform Use

BizApp360 may be used for legitimate business management purposes including CRM, job cards, scheduling, quotations, invoicing, support tickets, field staff control, stock records, project control, facilities management, contractor marketplace visibility, documents, approvals, and operational analytics.

The platform must not be used to commit unlawful acts, misrepresent qualifications, submit fraudulent documents, infringe intellectual property, harass others, store malicious code, bypass security, or overload the platform.

5. Subscription, Trial and Billing

Subscription fees, trial terms, billing cycles, plan limitations, VAT treatment where applicable, storage limits, user limits, feature limits, onboarding fees, renewal rules, failed-payment handling, cancellation and refund rules are governed by the Subscription Billing Terms, Trial Terms, Refund and Cancellation Policy, and applicable order form or accepted checkout flow.

6. Customer Data Ownership and Licence

Customers retain ownership of Customer Data. The customer grants BizApp360 a limited licence to host, process, transmit, back up, secure, display, troubleshoot, and otherwise use Customer Data only as necessary to provide, improve, support, protect, and administer the Services and comply with law.

7. Privacy and POPIA

Personal information is handled under the Privacy Policy, POPIA Policy, Data Processing Agreement, Data Retention Policy, Security Policy, Incident Response Policy, and applicable South African data protection requirements. Customers remain responsible for ensuring they have a lawful basis to upload, share, invite, or process data subjects' personal information in their tenant.

8. Marketplace and Contractor Listings

Marketplace participation is subject to Marketplace Terms and the Contractor Verification Policy. BizApp360 may facilitate discovery, lead routing, profile display, quote requests, and reviews, but unless expressly agreed in writing, BizApp360 is not the contractor, employer, principal contractor, insurer, broker, or guarantor of third-party work.

9. White-Label and Domains

White-label, custom domain, tenant branding, branch branding, and reseller arrangements are subject to White-Label Terms and a signed order form. Customers are responsible for lawful use of their own brand, logos, domains, DNS, email configuration, and client-facing content.

10. Integrations and APIs

Use of APIs, webhooks, third-party integrations, tracking systems, accounting systems, email systems, payment providers, AI tools, storage providers, maps, SMS, WhatsApp or other external services is subject to API Terms and the relevant third-party terms. BizApp360 is not responsible for third-party outages, pricing changes, rate limits, or data handling outside BizApp360's direct control.

11. Intellectual Property

BizApp360 owns or licenses all platform software, source code, workflows, user interface layouts, templates, automation logic, designs, trademarks, documentation, and platform content, excluding Customer Data and customer-owned branding. No rights are transferred except the limited right to use the Services during an active subscription.

12. Suspension and Termination

BizApp360 may suspend or restrict access where there is non-payment, security risk, legal risk, misuse, suspected fraud, abusive conduct, breach of policies, or regulatory concern. Where practical, BizApp360 will provide notice and an opportunity to resolve the issue, except where urgent action is required to protect users, tenants, data, systems, or legal compliance.

13. Disclaimers

The Services are provided on an "as available" basis, subject to applicable law and agreed service levels. BizApp360 does not guarantee uninterrupted service, error-free operation, guaranteed revenue, guaranteed lead volume, legal compliance by customers, contractor performance, payment collection, tax outcomes, immigration outcomes, or business success.

14. Limitation of Liability

To the maximum extent permitted by law, BizApp360's aggregate liability is limited to the fees paid by the customer for the affected service during the three months preceding the event giving rise to the claim, unless a signed enterprise agreement states otherwise. This clause must be reviewed by an attorney for enforceability and alignment with South African consumer and commercial law.

15. Governing Law and Disputes

These Terms are governed by the laws of the Republic of South Africa. Parties must first attempt good-faith escalation through support and management channels before commencing formal legal proceedings, except for urgent interdictory relief, debt recovery, intellectual property protection, confidentiality breaches, or security-related matters.

16. Document Acceptance and Updates

BizApp360 may update this document. Where a material change occurs, the platform may require users, tenant owners, administrators, marketplace participants, API users, or client portal users to re-accept the updated version before continuing use.

02 Privacy Policy BizApp360

Privacy Policy

BizApp360 (Pty) Ltd | BizApp360.com

Title	Privacy Policy
Category	Privacy and Data Protection
Version	1.0
Effective Date	2026-05-22
Status	Draft
Attorney Review Required	Yes
Visibility	Public
Acceptance Required	Yes
Owner	BizApp360 (Pty) Ltd
Contact	Admin: admin@bizapp360.com Support: support@bizapp360.com Accounts: accounts@bizapp360.com

1. Overview

This document applies to all use of BizApp360.com and related websites, applications, portals, marketplaces, APIs, support channels, onboarding workflows, trial accounts, paid subscriptions, white-label instances, and client portals operated by BizApp360 (Pty) Ltd.

Company details: Registration Number 2024/605478/07; Tax Number 9011061323; Address: Remote-operated business, South Africa; Telephone: +27 73 128 4112; Email: admin@bizapp360.com.

This Privacy Policy explains how BizApp360 collects, uses, stores, shares, protects, retains, and deletes personal information when users visit the website, register, activate a trial, use the platform, create marketplace profiles, invite staff, upload documents, contact support, use integrations, or interact with client portals.

2. Personal Information We May Process

- Identity and contact details such as names, surnames, email addresses, phone numbers, job titles and company details.
- Account details such as login identifiers, roles, permissions, tenant membership, branch allocations, access logs and acceptance records.
- Business operational data such as customers, sites, job cards, quotes, invoices, stock, projects, tickets, documents, photos, signatures, notes and communications.
- Billing data such as plan selection, invoices, payment status, VAT/tax information and accounts contact details.
- Technical data such as IP address, user agent, device, browser, logs, security events, cookies, session data and API activity.
- Marketplace data such as public profile information, verification documents, services, service areas, reviews, quote requests and lead information.

3. Purposes of Processing

- To provide, operate, secure and support the platform.
- To create and manage accounts, tenants, trials, subscriptions and onboarding.
- To process billing, cancellations, renewals and account administration.
- To route jobs, quotes, leads, tickets, approvals and support requests.
- To verify contractors and protect marketplace trust.
- To monitor security, prevent abuse, investigate incidents and maintain audit logs.
- To comply with legal, tax, accounting, regulatory and contractual obligations.
- To improve the platform, troubleshoot errors and develop features.

4. Legal Basis and Customer Responsibility

For BizApp360's own account administration, billing, support and security processing, BizApp360 acts as a responsible party where applicable. For Customer Data uploaded and managed inside a tenant, the customer is generally the responsible party and BizApp360 generally acts as operator/service provider, unless a specific feature or agreement states otherwise.

Customers must ensure that they have a lawful basis to collect and upload personal information to BizApp360, and that their own employees, customers, tenants, contractors and suppliers receive proper privacy notices where required.

5. Sharing and Third Parties

BizApp360 may share personal information with hosting providers, email providers, payment providers, analytics providers, security tools, customer support tools, SMS/WhatsApp providers, maps/geocoding providers, accounting integrations, legal/accounting advisors, regulators, law enforcement, and other processors where necessary for the Services. A subprocessor register should be maintained and updated as integrations are activated.

6. Cross-Border Transfers

Some systems, hosting regions, third-party processors, support tools, backups, logs, email services, or integrations may operate outside South Africa. BizApp360 will use reasonable contractual, technical, and organisational controls to protect personal information during cross-border processing.

7. Security

BizApp360 applies reasonable safeguards including access controls, tenant separation, role permissions, audit logs, encryption where appropriate, backups, least privilege, administrative controls, incident response processes, and security monitoring. No system is perfectly secure, and users must also protect their credentials, devices and authorised users.

8. Retention

Personal information is retained only for as long as reasonably required for operational, billing, legal, security, support, audit, backup, tax, contractual, dispute-resolution and legitimate business purposes. Detailed retention rules are set out in the Data Retention Policy.

9. Data Subject Rights

Data subjects may request access, correction, deletion, objection, restriction, or other lawful relief by contacting BizApp360 or the relevant customer responsible for the data. Where BizApp360 acts as operator, requests relating to Customer Data may be referred to the relevant customer.

10. Contact

Privacy requests may be sent to admin@bizapp360.com. Support requests may be sent to support@bizapp360.com. Billing requests may be sent to accounts@bizapp360.com.

03 POPIA Policy BizApp360

POPIA Policy

BizApp360 (Pty) Ltd | BizApp360.com

Title	POPIA Policy
Category	Privacy and Data Protection
Version	1.0
Effective Date	2026-05-22
Status	Draft
Attorney Review Required	Yes
Visibility	Public
Acceptance Required	Yes
Owner	BizApp360 (Pty) Ltd
Contact	Admin: admin@bizapp360.com Support: support@bizapp360.com Accounts: accounts@bizapp360.com

1. Purpose

This policy establishes BizApp360's governance approach for the Protection of Personal Information Act, 2013 (POPIA), including responsible party/operator allocation, lawful processing, minimum necessary processing, security safeguards, breach handling, data subject rights and operator contracts.

2. Eight Processing Principles

BizApp360's privacy controls must support accountability, processing limitation, purpose specification, further processing limitation, information quality, openness, security safeguards and data subject participation.

3. Responsible Party and Operator Model

For tenant Customer Data, the customer will usually be the responsible party and BizApp360 will usually act as operator. For BizApp360 account, billing, marketplace administration, support, security and marketing operations, BizApp360 may act as responsible party.

4. Security Safeguards

BizApp360 must maintain reasonable technical and organisational measures including role-based access, authentication controls, audit logging, secure development practices, backup procedures, vulnerability management, employee confidentiality, least privilege, incident response and supplier review.

5. Operator Contracts

Where BizApp360 processes personal information for customers, the Data Processing Agreement must govern instructions, confidentiality, safeguards, subprocessing, assistance, breach notification and return/deletion of data.

6. Security Compromises

If there are reasonable grounds to believe personal information has been accessed or acquired by an unauthorised person, BizApp360 must activate incident response, assess roles and obligations, notify affected customers, and support regulatory or data subject notifications where required.

7. Data Subject Requests

BizApp360 must provide a practical route for access, correction, deletion, objection or complaint requests, and must route Customer Data requests to the relevant customer where BizApp360 acts as operator.

8. Training and Review

This policy must be reviewed at least annually, after major product changes, after security incidents, and before international expansion.

04 Data Processing Agreement BizApp360

Data Processing Agreement

BizApp360 (Pty) Ltd | BizApp360.com

Title	Data Processing Agreement
Category	Privacy and Data Protection
Version	1.0
Effective Date	2026-05-22
Status	Draft
Attorney Review Required	Yes
Visibility	Public
Acceptance Required	Yes
Owner	BizApp360 (Pty) Ltd
Contact	Admin: admin@bizapp360.com Support: support@bizapp360.com Accounts: accounts@bizapp360.com

1. Parties and Role Allocation

This Data Processing Agreement applies where BizApp360 processes personal information on behalf of a customer. The customer is generally the responsible party/controller and BizApp360 is generally the operator/processor for Customer Data.

2. Processing Instructions

BizApp360 will process Customer Data only according to the agreement, customer configuration, platform functionality, support instructions, lawful documented instructions and requirements of applicable law.

3. Categories of Data

Data may include employee data, customer data, supplier data, tenant data, job card data, photos, documents, signatures, billing data, operational notes, service locations, device/log data, and marketplace lead information.

4. Confidentiality

BizApp360 personnel and authorised contractors with access to Customer Data must be bound by confidentiality obligations and least-privilege access controls.

5. Security Measures

BizApp360 must maintain reasonable safeguards including access control, authentication, logging, backups, encryption where appropriate, administrative procedures, incident response and supplier controls.

6. Subprocessors

BizApp360 may use subprocessors for hosting, email, payments, storage, analytics, maps, messaging, support and security. BizApp360 must maintain a subprocessor register and impose suitable data protection obligations.

7. Incident Notification

BizApp360 will notify the customer without undue delay after becoming aware of a confirmed or reasonably suspected security compromise affecting Customer Data, subject to investigation and legal constraints.

8. Return and Deletion

Upon termination, Customer Data export, deletion, retention and backup purge processes will follow the Data Retention Policy, signed order form and legal requirements.

9. Audit and Assistance

BizApp360 will provide reasonable assistance to customers for data subject requests, security questionnaires, regulatory queries and audit evidence, subject to confidentiality, security and reasonable effort limits.

05 Client Service Agreement BizApp360

Client Service Agreement

BizApp360 (Pty) Ltd | BizApp360.com

Title	Client Service Agreement
Category	Commercial Agreement
Version	1.0
Effective Date	2026-05-22
Status	Draft
Attorney Review Required	Yes
Visibility	Public
Acceptance Required	Yes
Owner	BizApp360 (Pty) Ltd
Contact	Admin: admin@bizapp360.com Support: support@bizapp360.com Accounts: accounts@bizapp360.com

1. Agreement Structure

This agreement governs paid services, enterprise onboarding, configuration, subscription access, support, white-label setup, marketplace activation, data migration assistance, training and professional services purchased from BizApp360.

2. Customer Responsibilities

The customer must provide accurate information, appoint an authorised account owner, configure roles correctly, obtain necessary consents, manage its users, verify uploaded information, pay fees, and use the platform lawfully.

3. BizApp360 Responsibilities

BizApp360 will provide platform access, reasonable support, onboarding guidance, security controls, billing administration, system maintenance, and agreed professional services according to the order form.

4. Implementation

Implementation may include tenant setup, company profile configuration, users, departments, roles, sample workflows, marketplace profile setup, domain/white-label setup, document loading and acceptance workflow configuration.

5. Fees and Payment

Fees are payable according to the order form, subscription plan, billing cycle and Subscription Billing Terms. Non-payment may result in notices, restricted access, suspension or termination.

6. Change Requests

Custom development, complex integrations, data migration, workflow redesign, domain setup, or enterprise configuration outside the included plan must be quoted, approved and documented separately.

7. Acceptance

Platform access or continued use after activation constitutes acceptance of configured services, unless a written implementation acceptance process applies.

8. Termination and Exit

Upon termination, the customer must export required data before the retention period expires. BizApp360 may retain records required for tax, legal, billing, security or audit purposes.

06 SLA and Support Policy BizApp360

SLA and Support Policy

BizApp360 (Pty) Ltd | BizApp360.com

Title	SLA and Support Policy
Category	Support and Operations
Version	1.0
Effective Date	2026-05-22
Status	Draft
Attorney Review Required	Yes
Visibility	Public
Acceptance Required	Yes
Owner	BizApp360 (Pty) Ltd
Contact	Admin: admin@bizapp360.com Support: support@bizapp360.com Accounts: accounts@bizapp360.com

1. Support Channels

Support is provided through designated in-platform support, support@bizapp360.com, help resources, onboarding guidance and approved enterprise escalation channels.

2. Support Hours

Standard support is targeted for South African business hours, excluding public holidays, unless an enterprise agreement provides extended support.

3. Severity Levels

Severity 1: platform-wide outage or critical security incident. Severity 2: major feature unavailable for multiple users. Severity 3: impaired feature with workaround. Severity 4: question, training, minor issue or enhancement request.

4. Target Response Times

Severity 1: target initial response within 4 business hours. Severity 2: 1 business day. Severity 3: 2 business days. Severity 4: 3 business days. These are support targets, not absolute guarantees, unless stated in a signed enterprise SLA.

5. Maintenance

BizApp360 may perform planned maintenance, emergency maintenance and security updates. Where practical, affected users will receive prior notice for material planned downtime.

6. Customer Duties

Customers must provide screenshots, browser/device details, affected user details, tenant name, steps to reproduce and business impact, and must not share passwords or confidential customer information unnecessarily.

7. Exclusions

SLA excludes third-party outages, customer internet failure, incorrect customer configuration, unsupported browsers, customer device issues, external API failures, payment provider outages, or customer-created data errors.

07 Refund and Cancellation Policy BizApp360

Refund and Cancellation Policy

BizApp360 (Pty) Ltd | BizApp360.com

Title	Refund and Cancellation Policy
Category	Billing and Customer Lifecycle
Version	1.0
Effective Date	2026-05-22
Status	Draft
Attorney Review Required	Yes
Visibility	Public
Acceptance Required	Yes
Owner	BizApp360 (Pty) Ltd
Contact	Admin: admin@bizapp360.com Support: support@bizapp360.com Accounts: accounts@bizapp360.com

1. Purpose

This policy governs subscription cancellation, failed payments, downgrade requests, refund eligibility, trial cancellation, annual plan termination and account closure.

2. Monthly Plans

Customers may cancel future renewals according to the platform cancellation workflow or by contacting accounts@bizapp360.com. Cancellation normally stops future billing but does not automatically refund past paid periods.

3. Annual Plans

Annual plans may offer discounted pricing in exchange for a longer commitment. Refunds for annual plans are not automatic and must be assessed against the order form, consumer law, service usage and fairness.

4. Trials

Users may cancel during a trial to avoid paid activation where card/payment activation is configured. Trial terms are governed by the Trial Terms document.

5. Refund Criteria

Refunds may be considered for duplicate charges, clear billing errors, proven non-delivery of paid onboarding services, or other circumstances approved by BizApp360 management.

6. No Refund Circumstances

Refunds are generally not provided for unused time, customer inactivity, lack of training attendance, customer configuration errors, third-party outages, suspension due to breach, or failure to cancel before renewal.

7. Data After Cancellation

Customers must export required data before closure. Retention and deletion follow the Data Retention Policy.

08 Security Policy BizApp360

Security Policy

BizApp360 (Pty) Ltd | BizApp360.com

Title	Security Policy
Category	Security and Risk
Version	1.0
Effective Date	2026-05-22
Status	Draft
Attorney Review Required	Yes
Visibility	Public
Acceptance Required	Yes
Owner	BizApp360 (Pty) Ltd
Contact	Admin: admin@bizapp360.com Support: support@bizapp360.com Accounts: accounts@bizapp360.com

1. Security Objective

BizApp360 must protect confidentiality, integrity and availability of customer, platform, marketplace, billing and operational data through practical, risk-based controls.

2. Access Controls

Access must follow least privilege, role-based access, separation of tenant data, unique user accounts, strong passwords, MFA where available, administrative approval for privileged access and review of inactive accounts.

3. Application Security

Development must include secure coding practices, dependency review, secret scanning, code review, vulnerability scanning, OWASP-aligned checks, environment separation and secure release management.

4. Infrastructure Security

Hosting, storage, database, backups, DNS, email and integrations must be configured using secure defaults, access logging, restricted admin access, encryption where available and supplier review.

5. Monitoring and Logging

Security-relevant events must be logged where practical, including login activity, administrative changes, legal acceptance records, API key activity, failed access attempts and tenant-sensitive changes.

6. Incident Management

Suspected security incidents must be escalated under the Incident Response Policy, with containment, investigation, communication, remediation, evidence retention and lessons learned.

7. Customer Shared Responsibility

Customers must manage their users, devices, roles, passwords, exports, integrations, contractor invitations and internal approval processes securely.

09 Acceptable Use Policy BizApp360

Acceptable Use Policy

BizApp360 (Pty) Ltd | BizApp360.com

Title	Acceptable Use Policy
Category	Platform Conduct and Abuse Prevention
Version	1.0
Effective Date	2026-05-22
Status	Draft
Attorney Review Required	Yes
Visibility	Public
Acceptance Required	Yes
Owner	BizApp360 (Pty) Ltd
Contact	Admin: admin@bizapp360.com Support: support@bizapp360.com Accounts: accounts@bizapp360.com

1. Purpose

This policy protects BizApp360, customers, users, marketplace participants and the public from misuse, security abuse, unlawful conduct and reputational harm.

2. Prohibited Conduct

Users may not use the platform for unlawful activity, fraud, impersonation, harassment, spam, malware, credential theft, scraping, rights infringement, illegal surveillance, unauthorised access, exploitation, bypassing limits, or storing content they are not entitled to process.

3. Marketplace Misuse

Contractors may not misrepresent licences, insurance, qualifications, service areas, availability, reviews, pricing, company identity or completion status.

4. Technical Abuse

Users may not overload systems, attempt penetration testing without written permission, reverse engineer, interfere with logs, abuse APIs, share API keys, or attempt to access another tenant.

5. Enforcement

BizApp360 may warn, restrict, suspend, remove content, disable marketplace listings, revoke API keys, report unlawful conduct or terminate accounts where misuse is suspected or confirmed.

10 Cookie Policy BizApp360

Cookie Policy

BizApp360 (Pty) Ltd | BizApp360.com

Title	Cookie Policy
Category	Website and Privacy
Version	1.0
Effective Date	2026-05-22
Status	Draft
Attorney Review Required	Yes
Visibility	Public
Acceptance Required	Yes
Owner	BizApp360 (Pty) Ltd
Contact	Admin: admin@bizapp360.com Support: support@bizapp360.com Accounts: accounts@bizapp360.com

1. Purpose

This policy explains how BizApp360 may use cookies, pixels, local storage, session storage and similar technologies on the website, platform, marketplace and client portals.

2. Types of Cookies

Strictly necessary cookies support login, security, session management, legal acceptance and platform operation. Preference cookies remember language, layout or settings. Analytics cookies help understand usage. Marketing cookies may support campaigns where enabled.

3. Consent and Control

Where required, non-essential cookies should be controlled through a consent banner or preference centre. Users can also manage cookies in their browser, but blocking necessary cookies may affect platform functionality.

4. Third-Party Cookies

Third-party tools such as analytics, support chat, payment providers, embedded content or marketing tools may set cookies according to their own policies.

5. Retention

Cookie retention periods should be documented in a cookie table when final website tooling is confirmed.

11 Marketplace Terms BizApp360

Marketplace Terms

BizApp360 (Pty) Ltd | BizApp360.com

Title	Marketplace Terms
Category	Marketplace and Public Discovery
Version	1.0
Effective Date	2026-05-22
Status	Draft
Attorney Review Required	Yes
Visibility	Public
Acceptance Required	Yes
Owner	BizApp360 (Pty) Ltd
Contact	Admin: admin@bizapp360.com Support: support@bizapp360.com Accounts: accounts@bizapp360.com

1. Marketplace Role

BizApp360 may provide a discovery platform where the public can find contractors, request quotes, compare profiles, submit reviews and route leads into contractor workspaces. BizApp360 is not automatically a party to work performed between customer and contractor.

2. Contractor Duties

Contractors must provide accurate registration details, services, contact details, coverage areas, licences where applicable, tax details where relevant, insurance status, availability and pricing representations.

3. Customer Duties

Members of the public and business requesters must provide accurate work descriptions, site details, contact details and access requirements, and must assess contractors before appointing them.

4. Lead Routing

Marketplace leads may be routed into BizApp360 CRM or contractor workflows. BizApp360 does not guarantee lead volume, quote acceptance, payment, work quality or business results.

5. Reviews

Reviews must be honest, lawful, non-defamatory and based on genuine experience. BizApp360 may moderate, remove or restrict reviews that appear fraudulent, abusive, discriminatory, unlawful or irrelevant.

6. Disputes

Service disputes between contractor and customer must be resolved between those parties unless BizApp360 has expressly agreed to provide a managed service, escrow, guarantee or dispute process.

12 Contractor Verification Policy BizApp360

Contractor Verification Policy

BizApp360 (Pty) Ltd | BizApp360.com

Title	Contractor Verification Policy
Category	Marketplace Trust and Verification
Version	1.0
Effective Date	2026-05-22
Status	Draft
Attorney Review Required	Yes
Visibility	Public
Acceptance Required	Yes
Owner	BizApp360 (Pty) Ltd
Contact	Admin: admin@bizapp360.com Support: support@bizapp360.com Accounts: accounts@bizapp360.com

1. Purpose

This policy defines how BizApp360 may verify contractors for marketplace visibility, trust badges, onboarding checks, risk review and customer confidence.

2. Verification Inputs

BizApp360 may request company registration documents, VAT/tax information, owner details, service categories, qualification proof, supplier approvals, insurance documents, address/coverage confirmation, portfolio evidence and references.

3. Verification Levels

Unverified means basic profile only. Basic Verified means identity/company information checked. Professional Verified means additional trade/service evidence reviewed. Enterprise Verified means deeper documentation, insurance and operational review.

4. No Guarantee

Verification indicates that certain documentation or checks were reviewed at a point in time. It is not a guarantee of quality, financial standing, legal compliance, workmanship, safety performance or future conduct.

5. Ongoing Review

BizApp360 may request updated documents, suspend badges, remove listings, investigate complaints or downgrade status if information expires, appears false or creates risk.

13 White Label Terms BizApp360

White-Label Terms

BizApp360 (Pty) Ltd | BizApp360.com

Title	White-Label Terms
Category	White-Label and Tenant Control
Version	1.0
Effective Date	2026-05-22
Status	Draft
Attorney Review Required	Yes
Visibility	Public
Acceptance Required	Yes
Owner	BizApp360 (Pty) Ltd
Contact	Admin: admin@bizapp360.com Support: support@bizapp360.com Accounts: accounts@bizapp360.com

1. Scope

These terms apply to custom domains, branded portals, client-branded dashboards, branch instances, regional partner branding, private client portals and white-label deployments.

2. Brand Assets

Customers are responsible for ensuring they own or have permission to use logos, names, domains, colours, trademarks and uploaded brand materials.

3. Domain Control

Customers must manage DNS records, domain ownership, renewals, SSL verification, email authentication and related third-party domain settings unless BizApp360 expressly agrees to manage them.

4. Platform Identity

White-label branding does not transfer ownership of the BizApp360 platform, source code, workflows, IP, security controls or underlying infrastructure.

5. Legal Documents

White-label customers may need their own public terms, privacy notices and customer-facing policies. BizApp360 platform legal documents must still be accepted where required.

6. Misrepresentation

Customers may not represent that they own the underlying platform, security certifications, compliance status or integrations unless expressly authorised in writing.

14 API Terms BizApp360

API Terms

BizApp360 (Pty) Ltd | BizApp360.com

Important legal status: This document is a professional launch template prepared for operational readiness. It is marked ATTORNEY REVIEW REQUIRED and must be reviewed by a qualified South African attorney before being published, relied upon, or presented as final legal advice.

Title	API Terms
Category	API and Integrations
Version	1.0
Effective Date	2026-05-22
Status	Draft
Attorney Review Required	Yes
Visibility	Public
Acceptance Required	Yes
Owner	BizApp360 (Pty) Ltd
Contact	Admin: admin@bizapp360.com Support: support@bizapp360.com Accounts: accounts@bizapp360.com

1. API Access

API access may be made available to approved customers, developers, integrations or enterprise users subject to plan limits, approval, documentation and security requirements.

2. Authentication

Users must protect API keys, tokens, webhooks, secrets and integration credentials. Credentials must not be shared publicly, committed to source code, exposed in client-side applications or used outside authorised tenants.

3. Rate Limits and Fair Use

BizApp360 may apply rate limits, usage quotas, payload limits, webhook retry rules, anti-abuse protections and API suspension where needed to protect platform stability.

4. Data Responsibility

Customers are responsible for data sent to or received from APIs, including lawful processing, third-party permissions, integration mapping, audit trails, exports and downstream security.

5. Breaking Changes

BizApp360 should provide reasonable notice for material API changes where practical, but may make urgent changes for security, stability or legal reasons.

6. Third-Party Integrations

Integrations with accounting systems, maps, payment services, messaging, telematics, email, AI or other third parties are subject to third-party terms, availability and pricing.

15 Data Retention Policy BizApp360

Data Retention Policy

BizApp360 (Pty) Ltd | BizApp360.com

Title	Data Retention Policy
Category	Data Governance
Version	1.0
Effective Date	2026-05-22
Status	Draft
Attorney Review Required	Yes
Visibility	Public
Acceptance Required	Yes
Owner	BizApp360 (Pty) Ltd
Contact	Admin: admin@bizapp360.com Support: support@bizapp360.com Accounts: accounts@bizapp360.com

1. Purpose

This policy defines practical retention rules for account, tenant, billing, marketplace, audit, support, security, backup and Customer Data records.

2. Active Customer Data

Active tenant data is retained while the subscription or trial remains active, subject to plan limits, lawful use and customer deletion settings.

3. Closed Accounts

After cancellation or termination, data may be retained for a limited operational exit period to allow export, then deleted or anonymised unless longer retention is required for legal, tax, billing, security, audit, dispute or backup purposes.

4. Billing and Tax Records

Invoices, payment records and tax-related records may be retained for legally required periods under applicable accounting and tax laws.

5. Security and Audit Logs

Security logs, legal acceptance records, login records and administrative audit logs may be retained for security, legal defence, compliance, incident investigation and abuse prevention.

6. Backups

Deleted data may remain in encrypted or access-controlled backups until backup rotation expires. Backups are not intended for individual record retrieval unless required for disaster recovery or legal reasons.

7. Deletion Requests

Where BizApp360 acts as operator, deletion requests for Customer Data must generally come from the customer responsible party or authorised tenant owner.

16 Incident Response Policy BizApp360

Incident Response Policy

BizApp360 (Pty) Ltd | BizApp360.com

Title	Incident Response Policy
Category	Security and Risk
Version	1.0
Effective Date	2026-05-22
Status	Draft
Attorney Review Required	Yes
Visibility	Public
Acceptance Required	Yes
Owner	BizApp360 (Pty) Ltd
Contact	Admin: admin@bizapp360.com Support: support@bizapp360.com Accounts: accounts@bizapp360.com

1. Purpose

This policy defines the process for identifying, triaging, containing, investigating, communicating, resolving and learning from security incidents and suspected personal information compromises.

2. Incident Types

Incidents may include unauthorised access, data leakage, malware, phishing, credential compromise, tenant isolation failure, lost device, misdirected email, exposed API key, suspicious admin activity, ransomware or third-party breach.

3. Response Phases

Preparation; detection; triage; containment; evidence preservation; investigation; eradication; recovery; notification assessment; customer communication; regulator/data subject support; post-incident review.

4. Roles

Incident owner, technical lead, customer communications lead, legal/privacy lead, support lead and executive decision maker must be assigned for significant incidents.

5. Notification Assessment

The team must assess whether personal information was accessed or acquired by an unauthorised person, affected customers, affected data subjects, applicable roles, regulatory obligations and communication timing.

6. Evidence

Logs, timestamps, screenshots, affected systems, user IDs, IP addresses, user agents, files, support tickets, emails and remediation steps must be preserved where practical.

7. Post-Incident Improvement

Every material incident must produce root cause analysis, corrective actions, owner, deadline and verification evidence.

17 Backup and Disaster Recovery Policy BizApp360

Backup and Disaster Recovery Policy

BizApp360 (Pty) Ltd | BizApp360.com

Title	Backup and Disaster Recovery Policy
Category	Resilience and Continuity
Version	1.0
Effective Date	2026-05-22
Status	Draft
Attorney Review Required	Yes
Visibility	Public
Acceptance Required	Yes
Owner	BizApp360 (Pty) Ltd
Contact	Admin: admin@bizapp360.com Support: support@bizapp360.com Accounts: accounts@bizapp360.com

1. Purpose

This policy defines BizApp360's approach to backups, recovery, continuity, restore testing, disaster scenarios and customer expectations.

2. Backup Scope

Backups may cover databases, storage, configuration, code repositories, environment configuration records and selected operational systems, depending on architecture and provider capability.

3. Backup Frequency

Production database backups should be scheduled according to risk and provider capability. Critical systems should have automated backups, snapshot or point-in-time recovery where commercially and technically practical.

4. Retention and Rotation

Backup retention must balance recovery requirements, cost, privacy, legal retention and deletion obligations. Backup periods must be documented once hosting architecture is finalised.

5. Restore Testing

Restore tests should be performed periodically and after major architecture changes to confirm backups are usable.

6. Disaster Scenarios

Scenarios include hosting outage, database corruption, accidental deletion, ransomware, credential compromise, third-party provider failure, domain/DNS issue and major deployment error.

7. Customer Communication

For material outages, BizApp360 should communicate impact, workaround, expected updates, resolution and post-incident actions through appropriate support or status channels.

18 Subscription Billing Terms BizApp360

Subscription Billing Terms

BizApp360 (Pty) Ltd | BizApp360.com

Title	Subscription Billing Terms
Category	Billing and Customer Lifecycle
Version	1.0
Effective Date	2026-05-22
Status	Draft
Attorney Review Required	Yes
Visibility	Public
Acceptance Required	Yes
Owner	BizApp360 (Pty) Ltd
Contact	Admin: admin@bizapp360.com Support: support@bizapp360.com Accounts: accounts@bizapp360.com

1. Billing Model

Subscriptions may be monthly, annual, trial-to-paid, freemium, enterprise, white-label, marketplace, user-tiered, storage-tiered or custom order-form based.

2. Fees

Fees exclude VAT unless clearly stated otherwise. Plan limits, included users, storage, modules, integrations, support level and enterprise features must be shown at checkout, order form or pricing page.

3. Renewal

Subscriptions renew automatically unless cancelled according to the cancellation process, unless a signed order form states otherwise.

4. Failed Payments

Failed payments may result in reminders, retry attempts, restricted access, suspension, downgrade or termination. Customer remains responsible for unpaid amounts.

5. Plan Changes

Upgrades may take effect immediately or at next billing cycle. Downgrades may be limited by user count, storage, active features, data volume or contractual commitments.

6. Taxes

Customers are responsible for applicable taxes, VAT, withholding or similar charges unless BizApp360 is legally required to collect them.

7. Disputes

Billing disputes must be raised promptly with accounts@bizapp360.com and include invoice number, tenant name, billing contact and dispute reason.

19 Trial Terms BizApp360

Trial Terms

BizApp360 (Pty) Ltd | BizApp360.com

Title	Trial Terms
Category	Billing and Customer Lifecycle
Version	1.0
Effective Date	2026-05-22
Status	Draft
Attorney Review Required	Yes
Visibility	Public
Acceptance Required	Yes
Owner	BizApp360 (Pty) Ltd
Contact	Admin: admin@bizapp360.com Support: support@bizapp360.com Accounts: accounts@bizapp360.com

1. Trial Purpose

Trials allow prospective customers to evaluate BizApp360 before committing to a paid subscription. Trial length, features, limits and conversion rules must be displayed during signup.

2. Eligibility

BizApp360 may limit trials per company, person, domain, payment method, phone number, IP address or tenant to prevent abuse.

3. Trial Limits

Trial accounts may have storage, user, module, marketplace, API, email, SMS, WhatsApp, white-label, export, integration or support limitations.

4. Conversion

At the end of the trial, access may expire, convert to paid, downgrade to free/freemium or require plan selection depending on the signup flow.

5. No Production Warranty

Trial users should not rely on the trial as a guaranteed production environment unless BizApp360 expressly approves production use.

6. Trial Data

Trial data may be deleted or restricted after expiry according to the Data Retention Policy.

20 E Signature Consent BizApp360

E-signature Consent

BizApp360 (Pty) Ltd | BizApp360.com

Title	E-signature Consent
Category	Legal Acceptance and Electronic Records
Version	1.0
Effective Date	2026-05-22
Status	Draft
Attorney Review Required	Yes
Visibility	Public
Acceptance Required	Yes
Owner	BizApp360 (Pty) Ltd
Contact	Admin: admin@bizapp360.com Support: support@bizapp360.com Accounts: accounts@bizapp360.com

1. Consent to Electronic Records

By using BizApp360, users consent to receiving, reviewing, accepting and storing legal documents, order forms, notices, approvals, job card signatures, client confirmations and platform consents electronically where legally permitted.

2. Electronic Acceptance Methods

Acceptance may occur by clicking “I agree”, ticking a checkbox, signing on screen, confirming by email, submitting an onboarding form, activating a trial, using an API key, continuing after notice, or other method that reasonably identifies the user and indicates approval.

3. Acceptance Records

BizApp360 should store user_id, tenant_id, document_id, version, accepted_at, IP address if available, user agent if available, method, source workflow and audit metadata.

4. Right to Paper Copies

Users may request copies of documents by contacting admin@bizapp360.com. BizApp360 may provide electronic downloadable copies rather than printed copies unless law requires otherwise.

5. Withdrawal

A user may withdraw consent where legally permitted, but withdrawal may prevent continued use of digital platform services that require electronic contracting and records.

6. Authority

The accepting user confirms they are authorised to accept documents for their own account and, where applicable, on behalf of the tenant/company they represent.

21 User Role and Access Policy BizApp360

User Role and Access Policy

BizApp360 (Pty) Ltd | BizApp360.com

Title	User Role and Access Policy
Category	Security and Access Governance
Version	1.0
Effective Date	2026-05-22
Status	Draft
Attorney Review Required	Yes
Visibility	Public
Acceptance Required	Yes
Owner	BizApp360 (Pty) Ltd
Contact	Admin: admin@bizapp360.com Support: support@bizapp360.com Accounts: accounts@bizapp360.com

1. Purpose

This policy defines governance for roles, permissions, tenant access, branch access, founder/admin access, sales representative access, client portal access, contractor access and support access.

2. Role Model

Access must be role-based and tenant-scoped. Example roles include platform super admin, BizApp360 support admin, sales representative, tenant owner, branch manager, department manager, accountant, stock controller, technician, contractor, client portal user and marketplace profile manager.

3. Least Privilege

Users must receive only the access needed for their function. Sensitive permissions such as billing, user management, legal acceptance override, API keys, exports, payroll, accounting and security settings must be restricted.

4. Founder and Internal Accounts

Founder/admin accounts must not be exposed through public “Create founder account” flows. Internal accounts must be provisioned through secure administrative workflows with audit logs.

5. Invitations

User invitations must be tenant-scoped, time-limited where practical, role-specific and auditable. Invitees must accept required legal documents before access.

6. Reviews

Tenant owners should review users and roles periodically, especially after staff changes, contractor completion, branch changes or suspected compromise.

7. Support Access

BizApp360 support access to customer tenants must be controlled, logged and limited to legitimate support, security, billing or legal purposes.

22 Subprocessor and Third Party Services Policy BizApp360

Subprocessor and Third-Party Services Policy

BizApp360 (Pty) Ltd | BizApp360.com

Title	Subprocessor and Third-Party Services Policy
Category	Privacy and Vendor Governance
Version	1.0
Effective Date	2026-05-22
Status	Draft
Attorney Review Required	Yes
Visibility	Public
Acceptance Required	Yes
Owner	BizApp360 (Pty) Ltd
Contact	Admin: admin@bizapp360.com Support: support@bizapp360.com Accounts: accounts@bizapp360.com

1. Purpose

This policy governs how BizApp360 selects, documents, monitors and discloses third-party services that may process customer, user, billing, marketplace, support or technical data.

2. Typical Service Categories

Hosting, database, object storage, email delivery, payment processing, analytics, error logging, maps, SMS/WhatsApp, customer support, security scanning, AI services, accounting integrations and telematics integrations.

3. Due Diligence

Before activating a material subprocessor, BizApp360 should assess purpose, data categories, location, security controls, data protection terms, availability, reputation and exit risk.

4. Customer Notice

A public or customer-accessible subprocessor register should identify material subprocessors, service purpose and broad processing location once vendors are finalised.

5. Flow-Down Obligations

Subprocessors must be subject to suitable confidentiality, security, data protection and incident notification obligations where commercially practical.

6. Changes

Material subprocessor changes should be recorded and customers should receive reasonable notice where required by enterprise contract or data protection commitments.

23 Data Subject Rights Procedure BizApp360

Data Subject Rights Procedure

BizApp360 (Pty) Ltd | BizApp360.com

Title	Data Subject Rights Procedure
Category	Privacy and Data Protection
Version	1.0
Effective Date	2026-05-22
Status	Draft
Attorney Review Required	Yes
Visibility	Public
Acceptance Required	Yes
Owner	BizApp360 (Pty) Ltd
Contact	Admin: admin@bizapp360.com Support: support@bizapp360.com Accounts: accounts@bizapp360.com

1. Purpose

This procedure defines how BizApp360 handles requests for access, correction, deletion, objection, restriction, information about processing and privacy complaints.

2. Intake

Requests may be received through admin@bizapp360.com, support@bizapp360.com, platform forms, support tickets or written communication. Requests must be logged with date, requester, contact details, request type and affected tenant where known.

3. Identity and Authority

BizApp360 must reasonably verify identity and authority before disclosing or changing personal information. For business accounts, authority of tenant owner or authorised representative may be required.

4. Responsible Party Routing

Where the request relates to Customer Data and BizApp360 acts as operator, the request should be routed to the relevant customer responsible party unless law requires BizApp360 to act directly.

5. Response

Responses should be clear, timely and documented. If a request is refused or limited, the reason should be recorded and communicated where appropriate.

6. Audit Trail

All requests, decisions, communications, exports, deletions and escalations must be logged for accountability.

24 AI Feature and Automation Disclaimer BizApp360

AI Feature and Automation Disclaimer

BizApp360 (Pty) Ltd | BizApp360.com

Title	AI Feature and Automation Disclaimer
Category	AI, Automation and Decision Support
Version	1.0
Effective Date	2026-05-22
Status	Draft
Attorney Review Required	Yes
Visibility	Public
Acceptance Required	Yes
Owner	BizApp360 (Pty) Ltd
Contact	Admin: admin@bizapp360.com Support: support@bizapp360.com Accounts: accounts@bizapp360.com

1. Purpose

This document governs any AI-assisted suggestions, bots, drafting tools, workflow automation, legal support prompts, accounting assistance, routing recommendations, support assistants or analytics features offered by BizApp360.

2. Decision Support Only

AI output is decision support and must not be treated as professional legal, tax, accounting, labour, medical, safety, engineering or financial advice unless separately reviewed by qualified professionals.

3. Customer Responsibility

Customers remain responsible for reviewing AI-generated outputs, verifying accuracy, applying professional judgement, obtaining expert advice, and complying with laws and workplace obligations.

4. Data Handling

Users must not submit unnecessary sensitive information, secrets, passwords, payment card details, private keys or information they are not authorised to process into AI features.

5. Automation Limits

Automations should be reviewed before triggering material actions such as payments, dismissals, legal notices, tax filings, payroll changes, contractor blacklisting or customer communications.

6. Monitoring

BizApp360 may monitor AI feature usage for abuse prevention, security, performance and product improvement, subject to privacy commitments.

25 Legal Document Register and Acceptance Matrix

Legal Document Register and Acceptance Matrix

BizApp360 (Pty) Ltd | BizApp360.com

Title	Legal Document Register and Acceptance Matrix
Category	Legal Operations
Version	1.0
Effective Date	2026-05-22
Status	Draft
Attorney Review Required	Yes
Visibility	Private
Acceptance Required	No
Owner	BizApp360 (Pty) Ltd
Contact	Admin: admin@bizapp360.com Support: support@bizapp360.com Accounts: accounts@bizapp360.com

1. Legal Document Register

This register is the operational index Codex should seed into the BizApp360 legal document management system. All documents are draft status until attorney review is completed and management approves activation.

Document	Category	Version	Effective	Status	Attorney Review	Visibility	Acceptance Required
Terms and Conditions	Website and Platform Legal	1.0	2026-05-22	draft	Yes	Public	Yes
Privacy Policy	Privacy and Data Protection	1.0	2026-05-22	draft	Yes	Public	Yes
POPIA Policy	Privacy and Data Protection	1.0	2026-05-22	draft	Yes	Public	Yes
Data Processing Agreement	Privacy and Data Protection	1.0	2026-05-22	draft	Yes	Public	Yes
Client Service Agreement	Commercial Agreement	1.0	2026-05-22	draft	Yes	Public	Yes
SLA and Support Policy	Support and Operations	1.0	2026-05-22	draft	Yes	Public	Yes
Refund and Cancellation Policy	Billing and Customer Lifecycle	1.0	2026-05-22	draft	Yes	Public	Yes
Security Policy	Security and Risk	1.0	2026-05-22	draft	Yes	Public	Yes
Acceptable Use Policy	Platform Conduct and Abuse Prevention	1.0	2026-05-22	draft	Yes	Public	Yes
Cookie Policy	Website and Privacy	1.0	2026-05-22	draft	Yes	Public	Yes
Marketplace Terms	Marketplace and Public Discovery	1.0	2026-05-22	draft	Yes	Public	Yes
Contractor Verification Policy	Marketplace Trust and Verification	1.0	2026-05-22	draft	Yes	Public	Yes
White-Label Terms	White-Label and Tenant	1.0	2026-05-22	draft	Yes	Public	Yes

	Control						
API Terms	API and Integrations	1.0	2026-05-22	draft	Yes	Public	Yes
Data Retention Policy	Data Governance	1.0	2026-05-22	draft	Yes	Public	Yes
Incident Response Policy	Security and Risk	1.0	2026-05-22	draft	Yes	Public	Yes
Backup and Disaster Recovery Policy	Resilience and Continuity	1.0	2026-05-22	draft	Yes	Public	Yes
Subscription Billing Terms	Billing and Customer Lifecycle	1.0	2026-05-22	draft	Yes	Public	Yes
Trial Terms	Billing and Customer Lifecycle	1.0	2026-05-22	draft	Yes	Public	Yes
E-signature Consent	Legal Acceptance and Electronic Records	1.0	2026-05-22	draft	Yes	Public	Yes
User Role and Access Policy	Security and Access Governance	1.0	2026-05-22	draft	Yes	Public	Yes
Subprocessor and Third-Party Services Policy	Privacy and Vendor Governance	1.0	2026-05-22	draft	Yes	Public	Yes
Data Subject Rights Procedure	Privacy and Data Protection	1.0	2026-05-22	draft	Yes	Public	Yes
AI Feature and Automation Disclaimer	AI, Automation and Decision Support	1.0	2026-05-22	draft	Yes	Public	Yes

2. Acceptance Trigger Matrix

Workflow	Documents to Require
Public website visit	Cookie Policy; Privacy Policy; Terms and Conditions where account creation begins
Signup / account creation	Terms and Conditions; Privacy Policy; POPIA Policy; E-signature Consent; User Role and Access Policy; Acceptable Use Policy; Trial Terms if trial selected
Trial activation	Trial Terms; Subscription Billing Terms where payment method or conversion applies; Refund and Cancellation Policy
Paid subscription checkout	Terms and Conditions; Client Service Agreement or order form; Subscription Billing Terms; Refund and Cancellation Policy; SLA and Support Policy
Enterprise onboarding	Client Service Agreement; DPA; SLA; Security Policy; Backup and Disaster Recovery Policy; Data Retention Policy; User Role and Access Policy
Marketplace profile creation	Marketplace Terms; Contractor Verification Policy; Privacy Policy; POPIA Policy; Acceptable Use Policy; E-signature Consent
White-label/domain setup	White-Label Terms; Client Service Agreement; Security Policy; User Role and Access Policy; Subscription Billing Terms
API key creation	API Terms; Security Policy; Acceptable Use Policy; DPA where

	Customer Data is processed
Client portal access	Privacy Policy; Terms and Conditions; E-signature Consent; applicable customer portal terms if configured
AI feature activation	AI Feature and Automation Disclaimer; Privacy Policy; Acceptable Use Policy

3. Acceptance Record Fields

- user_id
- tenant_id
- document_id
- version
- accepted_at
- ip_address if available
- user_agent if available
- acceptance_method
- workflow_context
- created_at
- updated_at

4. Version Change Rule

If any active legal document receives a new version and acceptance_required is true, Codex must calculate affected users by tenant/workflow/role and mark re_acceptance_required until the user accepts the new active version. Users may be blocked from sensitive workflows until re-acceptance is completed.

26 Codex Implementation Brief Legal Document System

Codex Implementation Brief - BizApp360 Legal Document System

CODEx IMPLEMENTATION BRIEF - BIZAPP360 LEGAL DOCUMENT SYSTEM

Company: BizApp360 (Pty) Ltd

Registration Number: 2024/605478/07

Tax Number: 9011061323

Address: Remote-operated business, South Africa

Phone: +27 73 128 4112

Emails: admin@bizapp360.com, support@bizapp360.com, accounts@bizapp360.com

Objective

Build a production-ready legal document management and acceptance system inside BizApp360.com. The system must load legal documents into the platform, version them, publish them, require acceptance at the correct workflows, store audit-grade acceptance records, and request re-acceptance when a legal document version changes.

Legal Document Model

Create a legal_documents table with:

- - id uuid primary key
- - slug text unique not null
- - title text not null
- - category text not null
- - version text not null
- - effective_date date not null
- - status text check in ('draft','active','archived') default 'draft'
- - attorney_review_required boolean default true
- - attorney_review_completed boolean default false
- - visibility text check in ('public','private','tenant','internal') default 'public'
- - acceptance_required boolean default true
- - body_markdown text not null
- - pdf_url text nullable for future download
- - created_by uuid nullable
- - updated_by uuid nullable
- - created_at timestampz default now()
- - updated_at timestampz default now()

Legal Acceptance Table

Create a legal_acceptances table with:

- - id uuid primary key
- - user_id uuid not null
- - tenant_id uuid nullable
- - document_id uuid references legal_documents(id)
- - document_slug text not null
- - version text not null
- - accepted_at timestampz default now()
- - ip_address inet nullable
- - user_agent text nullable

- - acceptance_method text not null default 'checkbox'
- - workflow_context text not null
- - metadata jsonb default '{}'
- - created_at timestampz default now()

Re-Acceptance Table

Create legal_reacceptance_requirements table with:

- - id uuid primary key
- - user_id uuid not null
- - tenant_id uuid nullable
- - document_slug text not null
- - required_version text not null
- - reason text not null
- - workflow_context text nullable
- - required_at timestampz default now()
- - satisfied_at timestampz nullable
- - status text check in ('pending','satisfied','waived') default 'pending'

Workflow Rules Table

Create legal_workflow_requirements table with:

- - id uuid primary key
- - workflow_key text not null
- - document_slug text not null
- - required_role text nullable
- - required_for_tenant_type text nullable
- - required_for_plan text nullable
- - block_until_accepted boolean default true
- - created_at timestampz default now()

Critical Workflows

- 1. signup
- 2. trial_activation
- 3. paid_subscription_checkout
- 4. enterprise_onboarding
- 5. marketplace_profile_creation
- 6. contractor_verification_submission
- 7. white_label_domain_setup
- 8. api_key_creation
- 9. client_portal_access
- 10. ai_feature_activation
- 11. billing_admin_access
- 12. support_admin_access

Acceptance Ux

- - Before completing a workflow, call getRequiredLegalDocuments(workflow_key, user_id, tenant_id).
- - Show document title, version, effective date, checkbox and link/view modal.
- - User cannot continue until all required documents are accepted.
- - Store IP address and user agent where available.
- - Store tenant_id when acceptance relates to tenant access.
- - Keep acceptance records immutable; never overwrite old acceptances.
- - When a new version becomes active, require re-acceptance only for affected users and workflows.

Founder Account Warning

Remove any public-facing “Create founder account” button. Founder/super-admin access must be provisioned through a protected internal admin workflow only, with audit logging and no public signup route.

Security/RIs Requirements

- - legal_documents public active documents may be readable publicly.
- - private/internal documents only readable by authorised roles.
- - legal_acceptances readable by the accepting user, tenant owner/admin, and authorised internal admin/support roles.
- - legal_acceptances insert allowed only for authenticated user accepting for themselves, or controlled service-role backend flow.
- - No user may alter an old acceptance record.
- - All admin changes to legal_documents must be audit logged.

Seed Documents

Seed all documents in the Legal Document Register. Use status='draft' first. Do not set status='active' until attorney_review_completed=true or management deliberately overrides with a warning.

Pdf/Download Option Later

Add pdf_url nullable now. Later generate PDFs from document body and store in secure storage bucket or public bucket depending on visibility.

Admin Ui

Create Legal Centre with:

- - document list
- - filters by category/status/visibility
- - version history
- - attorney review flag
- - activate/archive controls
- - acceptance count
- - users pending re-acceptance
- - workflow requirement editor

Public Ui

Create footer links for public documents:

- - Terms and Conditions
- - Privacy Policy
- - Cookie Policy
- - Acceptable Use Policy
- - Marketplace Terms where marketplace is public

Tests

Add tests for:

- - signup blocked until required docs accepted
- - trial activation acceptance records stored
- - enterprise onboarding requires DPA/SLA/Client Service Agreement
- - marketplace profile requires Marketplace Terms and Contractor Verification Policy
- - API key creation requires API Terms
- - version change triggers re-acceptance
- - archived documents no longer required for new acceptances
- - acceptance records are immutable
- - public cannot access private legal documents