TRAINING MANUAL

Good Inside Portal – Traceability System

Member Area
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Welcome to the Good Inside Portal – Traceability System

In UTZ’s traceability system all sales and processing activities of certified products are recorded. This makes it possible to follow the certified products through the supply chain and to link UTZ-labelled consumer products to their sustainable source.

In this training manual you can find a detailed overview of all parts and functionalities of the traceability system.

In the first section, all tabs of the Member Area are explained. Here you can easily get an overview of the information that can be found in the different tabs.

The second section explains all trading and stock activities step by step. Please note that, depending on your rights in the traceability system, not all activities might be available for you.

The third section shows how to manage transactions with other companies that are member of UTZ.

In the fourth section it is shown how you can manage your own account and how you can add more users to it.

If you cannot find the answer to your question in this training manual, please do not hesitate to contact us at techsupport@utz.org.

Good to know

Looking for information on UTZ’s labeling approval system? Please have a look at the folder ‘Labeling Approval Application’ under the tab ‘Downloads’ in the Good Inside Portal.
Section 1 – Introduction to the Member Area

General
If you are registered for more than one product with UTZ, please make sure that you first select the desired product in the upper right corner.

For an easier overview all tables can be customized. By clicking on the arrow that appears in each field of the headline when hovering over it, a small menu will open. You can sort the table in alphabetical order and you can choose the columns you want to see.

In the whole traceability system you can refresh the information in the table, as well as print or export it to Excel.
Transactions
Under the Transactions tab you find an overview of all the transactions you are involved in. The tab is organized like an e-mail system with an Inbox, Outbox and Finalized Transactions.

In your Inbox you find notifications about sales other members have made to you. Here you can confirm or reject them.

In your Outbox you see the transactions that you have made to other members. Before they have confirmed or rejected them, you have the possibility to withdraw or modify the transaction. Once the other member has confirmed or rejected the transaction, you will get a notification in your Inbox which you can acknowledge. Acknowledging means you have seen that the transaction has been confirmed – or rejected. All acknowledged transactions move to the Finalized Transactions.

Each tab contains filters that you can use to adjust the transaction information shown in the table. You can also perform a search of the records in each tab by using the search box.
Trading & Stock
Under the Trading & Stock tab you see an overview of your certified volume (producers) or your trading stock (supply chain actors). Here you find all functionalities to record your trading and stock activities that you are licensed for, like e.g. selling, converting, downgrading and tracing. Also, you can advertise on or purchase from the Marketplace, place volume into a warehouse (producers) or reflect a sale or purchase via the auction function.

Licenses
Under the Licenses tab you find an overview of your current and, if applicable, your previous licenses and certificates. In the license it is specified which transactions you can perform in the traceability system, and for which specific product.
Members with previous licenses can access this information under the link All Licenses.

Good to know: What is the difference between a certificate and a license?

A certificate is issued by the Certification Body after the audit, provided that the member complies with all requirements of UTZ. This certificate allows the member to claim the produced and/or traded products as UTZ certified. The trades of UTZ certified pure products need to be recorded in the traceability system.

A license gives the right to access the traceability system and has the same starting and ending date as the certificate. It is requested by the Certification Body after the audit* and needs to be approved by UTZ.

* Supply chain actors can consult the Chain of Custody to learn more about the exemptions.
Finance
Under the Finance tab you find an overview of your invoices. Under Current Balance you see all transactions for which you need to pay a program fee. Under Invoices you find an overview of all invoices with their payment status. The next invoicing date can be found below the table.

Marketplace
The Marketplace is an area in the traceability system where you can find certified products that were advertised by other members. If you are interested in buying an advertised product, you can contact the seller and agree on all details of the sale and reflect it afterwards in the traceability system.
Section 2 – Performing Trading and Stock Activities

Perform a Sales Announcement / Sell
Physical trades of certified products between members need to be reflected in the traceability system. This can be done by using the Sales Announcement function in case you are a producer, or the Sell function in case you are a supply chain actor. Below you can see where to find the option to reflect a sale, depending on your member type.

Good to know: What is the difference between a producer and a supply chain actor?

A producer is the UTZ certificate holder of a farm or farmer group who cultivates an UTZ certified crop. Producers are certified against the Code of Conduct.

Supply chain actors are actors who buy and/or sell UTZ certified products. Supply chain actors are certified against the Chain of Custody.

* Please consult the Chain of Custody to learn more about the exemptions.

Producers
In a producer’s account, the link to sell volume is called Sales Announcement and can be found under the tab Trading & Stock in the Certified Volume block.

Supply chain actors
In a supply chain actor’s account, the link to sell volume is called Sell and can be found under the tab Trading & Stock in the Trading Stock block.
By clicking on the link, the Sales Announcement / Sell form will open. Please enter the details of the sale and click on OK. Please note that the delivery date indicated in the form can only be backdated 180 days or until the first day of the validity of your and your buyer's license. In case the delivery date in the traceability system does not match your physical records, we recommend you to attach a document to the announcement confirming the actual delivery date.

Once the Sales Announcement / Sell has been submitted, your buyer will receive a notification in their Inbox, under the tab Transactions. When the buyer confirms the sale, the transaction is finalized in the system. You will receive a notification in your Inbox which you can acknowledge.

**Good to know**
The functionality flow in the appendix explains all details of making a Sales Announcement / Sell.
Perform a Purchase Announcement

If a producer does not have regular internet access and can therefore not make a Sales Announcement to you, the producer can give you on behalf user rights. After you have been given on behalf user rights, you can use the Purchase Announcement function in order to make a Sales Announcement on behalf of the producer to yourself.

If the producer has given you on behalf user rights, you can find the Purchase Announcement option under the Trading & Stock tab.

By clicking on the link, the Purchase Announcement form will open. Please enter the details of the purchase and click on OK. Please note that the delivery date indicated in the form can only be backdated 180 days or until the first day of the validity of your and your buyer's license. In case the delivery date in the traceability system does not match your physical records, we recommend you to attach a document to the announcement confirming the actual delivery date.

You will not have to confirm this transaction in your Inbox as it is a transaction made to yourself. It will move automatically to your Finalized Transactions.
Perform a Delivery Announcement

The Delivery Announcement reflects a placement of certified volume into a warehouse. All volumes placed in a warehouse can be sold as certified even after the license of the producer has expired. The only requirement is that the volume was placed in the warehouse before the expiry of the producer’s license and that the warehouse’s license is active at the time of sale.

The link Delivery Announcement can be found in the Certified Volume block under the Trading & Stock tab.

By clicking on the link, the Delivery Announcement form will open. Please enter the details of the delivery and click on OK to submit the announcement to the warehouse.

Good to know

The functionality flow in the appendix explains all details of making a Delivery Announcement. For more information on how to manage the warehouse, please have a look at the section Manage your Warehouse.
Perform a Delivery on Behalf

The Delivery on Behalf reflects a placement of certified volume into a physical warehouse, done by the warehouse on behalf of the producer. This function is only available if the producer has given you on behalf user rights and it can be used if a producer does not have regular internet access. All volumes placed in a warehouse can be sold as certified even after the license of the producer has expired. The only requirement is that the volume was placed in the warehouse before the expiry of the producer’s license and that the warehouse’s license is active at the time of sale.

The link Delivery on Behalf can be found under the Trading & Stock tab.

By clicking on the link, the Delivery on Behalf form will open. Please enter the details of the delivery and click on OK.

Delivery Announcement

You will not have to confirm this transaction in your Inbox as it is a transaction made to yourself. It will move automatically to your Finalized Transactions.

Good to know
For more information on how to manage the warehouse, please have a look at the section Manage your Warehouse.
Downgrade
The Downgrade function allows you to downgrade the program level of a product. This is done to reflect e.g. mixing of different volumes. Please note that you do not have the possibility to downgrade if you are only licensed for the lowest program level.

The link Downgrade can be found under the Trading & Stock tab.

By clicking on the link, the Downgrade form will open. Please indicate the volume you wish to downgrade and the program level you want to downgrade to.

Your stock will be updated accordingly.

Good to know
The overview in the appendix explains the differences between the different program levels.
Convert

The Convert function reflects the processing of a product into a derivative product. The conversion rates are defined per program. Please contact UTZ for more information on the conversion rates.

The link Convert can be found under the Trading & Stock tab.

By clicking on the link, the Convert process will start. Please choose first the output product you want to convert to.
In the next step you can choose the product you want to convert by clicking on the link Add. If you have several stock items for which the same conversion can be made, you can do several conversions at the same time. Please indicate the volume you wish to convert and click on Convert.

Your stock will be updated accordingly.
Mix
The Mix function reflects the mixing of products of the same type from different producers at program level. Identity Preserved. The mixed volume will still contain information about the producers' names and their respective volumes in the mix.

The Mix function can be found under the Trading & Stock tab.

By clicking on the link, the Mix form will open. Please choose the products you wish to mix and indicate the according volume per product.

Your stock will be updated accordingly.
Remove

The Remove function allows you to reduce the volume of either your certified volume (producers) or your trading stock (supply chain actors). This needs to be done if e.g. part of the volume has been damaged or sold as non-UTZ. Once the volume is removed, it cannot be claimed as UTZ anymore.

If you are the last actor in the supply chain it depends on your program’s rules whether you can remove volume or if you need to trace it instead. Please refer to the Chain of Custody for more information on when to use which functionality.

In case you are a supply chain actor in the cocoa program and you are licensed for the Mass Balance program level, it might be advisable to downgrade your cocoa instead of removing it. Please contact our Member Support Team via membersupport@utz.org in case you require more information.

The link Remove can be found under the Trading & Stock tab.
By clicking on the link, the Remove form will open. Please indicate the volume you wish to remove and indicate the reason for removal.

Your stock will be updated accordingly.
Trace

With the Trace function you can take volume out of the traceability system and generate a unique traceability number. Tracing reflects the end of the supply chain of a certified product – either because the pure product is packed or because it is mixed with other ingredients.

The link Trace can be found under the Trading & Stock tab.

By clicking on the link, the Trace form will open. Please indicate the volume which you want to trace and enter your own internal reference number.

A tracing document will be generated and the volume will not be available in your stock anymore. You can find the Trace transaction back in your Finalized Transactions, under the tab Transactions as well as in the Settings under Stock Management Log.
**Advertise on Marketplace**

The Marketplace is the area in the traceability system where members can advertise certified products to other members. All members are allowed to advertise products on the Marketplace. To advertise a product, please fill in the Advertise on Marketplace form.

**Good to know**

Each product placed on the Marketplace has its own 'handshake code'. This code is generated when the seller advertises the product on the Marketplace and needs to be filled in by the buyer when finalizing the transaction in the system. Therefore, please share the handshake code with your buyer after the sale has been finalized.

You can find the Advertise on Marketplace function in the Trading & Stock tab.
By clicking on the link, the Advertise on Marketplace form will open and the handshake code will be generated. Please fill in all the details of the advertised product and click on OK.

After filling in the form, your stock will be updated accordingly. The advertised product will now be visible to other members. You can see the product placed on the Marketplace in your Marketplace block under the Trading & Stock tab.

The announcement placed on the Marketplace is available for a limited amount of time. This time span is shown next to your Marketplace announcement in the Trading & Stock tab ('Expiration date').

**Good to know**
The functionality flow in the appendix explains all details of the Marketplace function.
Remove from Marketplace

If you do not longer want to advertise your product on the Marketplace, you can use the link Remove from Marketplace in your Marketplace block under the Trading & Stock tab.

By clicking on the link, the Remove from Marketplace place form will open. Please indicate the volume you would like to remove and the reason for removal. It is possible to remove only a part of the volume that was placed on the Marketplace. The handshake code for the remaining volume will stay the same.

Once removed, the Marketplace block and your stock will be updated accordingly.
Purchase from Marketplace

Members who are interested in a product that is advertised on the Marketplace can contact the seller outside of the traceability system to agree on the details of the sale. After the sale and physical shipment took place, the buyer needs to complete the transaction by using the Purchase from Marketplace function.

**Good to know**

Each product placed on the Marketplace has its own ‘handshake code’. This code is generated when the seller advertises the product on the Marketplace and needs to be filled in by the buyer when finalizing the transaction in the system. Therefore, please ask the seller for the handshake code after the sale has been finalized.

The link Purchase from Marketplace can be found under the Trading & Stock tab.

By clicking on the link, the Purchase from Marketplace process will start.

After entering the correct handshake code you are directed to the Purchase from Marketplace form.

Your stock will be updated accordingly.

**Good to know**

The functionality flow in the appendix explains all details of the Marketplace function.
Sell via Auction
The Sell via Auction function reflects the sale of an UTZ product to another member during a physical auction. The negotiation of the details of the sale take place during this auction and are not affected by UTZ. Only afterwards, the sale is reflected in the traceability system. Please note that the Sell via Auction function should only be used when the product is sold via an auction – if the product is sold to a buyer via another way (e.g. sales contracts), a normal Sales Announcement should be made.

Members who want to sell a certified product during an auction need to fill in the Sell via Auction form beforehand and attach a print of the form to the product at the auction. Once the physical sale has been agreed upon, the buyer needs to complete the transaction in the traceability system by using the Purchase from Auction function.

Good to know
Each product sold via the Auction function has its own ‘handshake code’. This code is generated when the seller fills in the Sell via Auction form and needs to be filled in by the buyer when finalizing the transaction in the system. The handshake code can be found either on the form that was attached to the product or you can ask the seller directly.

The Sell via Auction function can be found under the Trading & Stock tab.
By clicking on the link, the Sell via Auction form will open and the handshake code will be generated. Please indicate the product details and click on OK.

After filling in the form, your stock will be updated accordingly. The product can now be sold during an auction to another member. You can see the product in your Auction block under the Trading & Stock tab.

Any announcement via the Auction function is available for a limited amount of time. This time span is shown next to your Auction announcement in your Trading & Stock tab (‘Expiration date’).
Remove from Auction

If you do not longer want to sell your product via Auction, you can remove it by using the link Remove from Auction.

By clicking on the link, the Remove from Auction form will open. Please indicate the volume you want to remove and the reason for removal. It is possible to remove only a part of the volume that was intended to be sold via an auction. The handshake code for the remaining volume will stay the same.

Once removed, the Auction block and your stock will be updated accordingly.
Purchase from Auction
Members who bought a certified product during an auction need to complete the transaction by using the Purchase from Auction function.

Good to know
Each product sold via the Auction function has its own ‘handshake code’. This code is generated when the seller fills in the Sell via Auction form and needs to be filled in by the buyer when finalizing the transaction in the system. The handshake code can be found on the form that was attached to the product.

You can find the link Purchase from Auction under the Trading & Stock tab.

By clicking on the link, the Purchase from Auction process will start.

After entering the correct handshake code you are directed to the Purchase from Auction form.

Your stock will be updated accordingly.
Manage your Warehouse

If a producer stores his products in a warehouse, this can be reflected by making a Delivery Announcement in the traceability system for the corresponding volume(s). All volumes placed in a warehouse can be sold as certified even after the license of the producer has expired. The only requirement is that the volume was placed in the warehouse before the expiry of the producer’s license and that the warehouse’s license is active at the time of sale.

It is possible for both producers and supply chain actors to receive a warehouse license, but the warehouse can also be an independent member.

If you have a warehouse license, you can find the warehouse block under the Trading & Stock tab.

Sell

To sell the products placed in the warehouse onwards, you can use the Convert to Sell function. The Convert to Sell function follows the same procedure as making a Sales Announcement.

Remove

If volume is brought back from the warehouse to the producer, this is reflected with the Remove function. By using the link Remove, the volume you indicate will move back to the producer’s Certified Volume block. If the product is no longer available as UTZ, because e.g. it was sold as non-certified or under another certification scheme, the Remove function needs to be used again in the Certified Volume block of the producer.
Section 3 – Managing Transactions

Confirm a Transaction
When another member sells you a certified product and announces a sale to you in the traceability system, you will receive a notification in your Inbox. In order to finalize this sale and to receive the volume in your trading stock, you need to confirm the transaction.

You can find the Confirm link in your Inbox under the Transactions tab.

Please always check first if all the details of the sale as entered by the seller are correct. If all details are correct, please confirm the transaction by clicking on the link Confirm (otherwise you can reject the transaction). A new window will open. Here you can add your own reference number and attach a document.

Once the transaction has been confirmed, it will move to your Finalized Transactions. The confirmed volume will be available in your trading stock, under the Trading & Stock tab.

Good to know
The Buyer Reference Number is your personal reference number according to your own administration. The Seller Reference Number is the seller’s own administrative number and cannot be changed by the buyer.
Reject a Transaction
When another member sells you a certified product and announces a sale to you in the traceability system, you will receive a notification in your Inbox. If the details of the sale as indicated by the seller are not correct, you need to reject the transaction.

You can find the link Reject in your Inbox under the Transactions tab.

By clicking on the link Reject, a new window will open. Please indicate the reason for rejection and confirm the rejection by ticking the confirmation box.

Once the transaction has been rejected, it will move to your Finalized Transactions. The seller will receive a notification in their Inbox where they can modify and resubmit the transaction.
Modify a Transaction

When you announce a sale in the traceability system, the transaction will move to your Outbox. Before the buyer confirms or rejects this pending transaction, you still have the possibility to modify the transaction.

By clicking on the link Modify, a new window will open. Here you can modify the details of the sale.

The transaction will be updated with the changes in both your Outbox and the Inbox of the buyer.
Withdraw a Transaction

When you announce a sale in the traceability system, the transaction will move to your Outbox. Before the buyer confirms or rejects the pending transaction, you still have the possibility to withdraw the transaction.

By clicking on the Withdraw link, a new window will open. Please enter the reason for withdrawal and confirm the withdrawal by ticking the confirmation box.

The transaction will move to your Finalized Transactions with the status ‘Withdrawn’. The transaction in the buyer’s Inbox will receive the status ‘Withdrawn’ as well. The buyer can only acknowledge the withdrawal, but they cannot confirm or reject the transaction anymore. The volume will remain in your Trading & Stock.
Modify and Resubmit a Transaction

When you announce a sale in the traceability system, it is possible that your buyer rejects the transaction. You will get a notification in your Inbox with the possibility to modify the transaction and resubmit it.

By clicking on Modify and Resubmit, a new window will open. Here you see the reason for rejection as entered by the buyer. You can adjust the details of the sale like e.g. the volume.

After clicking on OK, the transaction will be resubmitted and the buyer will get a notification in the Inbox.
Cancelled by System Transaction

All transactions need to be confirmed within the validity period of the license of both members involved in the transaction. If a transaction is not confirmed and the license period of one of the members ends, the transaction will be automatically cancelled and will receive the status ‘Cancelled by System – Pending Resubmission’. Both the seller and the buyer will receive a notification in their Inbox. By acknowledging, the transaction will move to the Finalized Transactions.

However, once the new license is active again, a new transaction with the same details will be automatically generated. This is a copy of the previous transaction and can be found in the Outbox of the seller and in the Inbox of the buyer. The further procedure is as usual.

The transaction with the status ‘Cancelled by System – Pending Resubmission’ will then receive the new status ‘Cancelled by System – Resubmitted’ so you see immediately that a copy has been generated.

Good to know
A copy of the cancelled transaction can only be generated if the new license still meets the requirements for the transaction.
Section 4 – Managing your Settings

Good to know
The Settings are only accessible to primary users of your account. Normal users do not see the link to the Settings.

User Management
In the User Management you can add other users, give them access to certain parts of the traceability system and monitor their activities.

Add users
In the User Management section, you can add users (e.g. colleagues) to your account and define which parts of the traceability system they can see and whether or not they can perform transactions. The link Add User can be found at the bottom of the User Management block.

By clicking on the link, the Add User form will open. Please enter the user’s contact details and select the contact type.

Once filled in, click on OK. The newly created user will appear in the overview of the User Management and the user will receive an email with login credentials for the Good Inside Portal.
Primary and Normal Users
A user in the Good Inside Portal can either be a primary or a normal User. The difference is that a primary user has full access to all parts of the traceability system, including the Settings. Primary users can perform all transactions.

Normal users don’t have access to the Settings. Next to that, a normal user only can see the parts of the traceability system that a primary user has given them access to. The primary user can change the settings for any normal user through the Modify functionality.

Modify users
Once a new user has been created in the User Management, the primary user can modify the parts of the traceability system the new user should get access to, adapt the email address and reset the password if necessary. The link Modify can be found next to a user’s name.

By clicking on the link, the Modify window will open. Under the Assign Role tab you can indicate the parts of the traceability system the user is allowed to access.

Good to know
The Read-Only role allows a user to see information in a certain tab, but not to perform any transactions.
The User Activity Log gives you an overview of the transactions the user has performed in the traceability system.

Add guest users
The primary user of both a producer’s and a supply chain actor’s account can add other members as guest users. Guest users can be given rights to perform basic trading activities for your account. The link Add Guest User can be found in the User Management section.

By clicking on the link, the Add Guest User form will open. First, you need to enter the User ID of the user you wish to add.

Good to know
The User ID is a unique number of a specific user in the traceability system, different from the Member ID, and can be provided by the primary user of the guest user’s account. In the User Management, the primary user can see the User ID by clicking on the link Modify next to the user’s name.
After filling in the User ID, you can define the parts of the traceability system the guest user should get access to.

Once filled in, click on OK. The newly created guest user will appear in the overview of your User Management. The guest user can now access the parts of your account you have given them rights for. This they do in their own account in the traceability system by switching to the guest user account in the upper right corner. Please note that there is also the possibility to give users (guest users, normal users as well as primary users) read-only rights for certain tabs. This means that the user cannot make any changes in the system in this tab but can view all changes that have been made.
Add on behalf users
The primary user of a producer’s account can give their first buyer on behalf user. This allows the first buyer to perform a Purchase Announcement on behalf of the producer, in case the producer does not have regular internet access. The link Add On Behalf User can be found in the User Management section.

By clicking on the link, the Add On Behalf User form will open. First, you need to enter the User ID of the user you wish to add.

Good to know
This User ID is a unique number of a specific user in the traceability system, different from the Member ID, and can be provided by the primary user of the user’s account. In the User Management the primary user can see the User ID by clicking on the link Modify next to the user’s name.
Once the User ID is filled in, you can confirm that the user may perform purchases on your behalf by ticking the box. Once filled in, click on OK. The newly created on behalf user will appear in the overview of the User Management. The on behalf user can now perform a Purchase Announcement from your certified volume.

**Good to know**

We strongly recommend to request a regular report of the transactions done on your behalf. Even if you give on behalf user rights to another person to manage your account, you are still responsible for the correct administration of (the volumes in) your account. You can revoke the on behalf user rights at any time.
Company Address
The Company Address section contains account information such as your Member ID, contact details and mailing and billing address. You can choose whether or not your company should be shown in the Member Directory of the Good Inside Portal. The Member Directory is an overview of all registered members where you can look for potential suppliers or clients and their contact information. You can further choose if you want to be shown on the interactive map of the UTZ website. This is only applicable to producers.

Good to know
You can indicate an alternate billing address. This can either be another member or an external party. If you wish to add an alternate billing party, please contact UTZ.
User Management Log
In the User Management Log section you can monitor all activities that have been performed in the Settings, like adding users or modifying roles of users. You can also see which user has performed these actions.

Stock Management Log
The Stock Management Log section provides an overview of all stock activities that have been performed with your account, like converting or downgrading. You can also see who has performed these actions.

Undo stock activities
Here you can also undo stock activities. However, for undoing stock activities, there are restrictions defined in your program’s rules. For more information about these rules, please contact UTZ.
Appendix

Sales Announcement /Sell

If the producer doesn’t have regular internet access, they can give on behalf user rights to the first buyer. The first buyer then can make a Purchase Announcement on behalf of the producer.
If the producer doesn't have regular internet access, they can give on behalf user rights to the warehouse. The warehouse then can make a Delivery on Behalf for the producer.
Program levels
A program level describes the product’s level of traceability. UTZ offers the following program levels:

Identity Preserved (IP): The origin of a product is known throughout the supply chain. UTZ products at program level IP are not mixed with other certified or non-certified products. IP is the highest program level. If different products at program level IP are mixed, the program level will show as Mixed IP. In Mixed IP, the origins of the products in the mix are known throughout the supply chain.

Segregated (SG): Mixture of several UTZ products from different origins. The difference between SG and Mixed IP is that at program level SG the exact origins of the different certified products are not known. All that is known is that all products in the mix are from UTZ origins.

Mass Balance (MB): Mass Balance is not a physical traceability level, but an administrative one. This means that UTZ products can be mixed with non-certified products at some point along the supply chain. For MB, the rules on managing stocks administratively (not selling more as UTZ than what has been purchased) are defined in the Chain of Custody. MB is the lowest program level.

Please note that only program levels that you are certified/licensed for will be available in your account in the traceability system.

In addition, not every program level is available for every product. Please contact UTZ at membersupport@utz.org if you want to learn more about the programs’ rules.