USER MANUAL

Good Inside Portal – Labeling approval system

UTZ
**Better farming
Better future**

Contents

1. Getting started

In the labeling approval system of UTZ, members can request a labeling approval for UTZ labeled packaging for final products. All final products carrying an UTZ claim and logo must comply with the latest version of the **Labeling and Trademark Policy** and be approved by UTZ prior to printing (see Control points 23-25 of the **Chain of Custody Standard**). Labeling approval requests for herbal teas and hazelnuts must be sent per e-mail to **membersupport@utz.org**.

By approving the packaging, UTZ makes sure that the claims correspond to requirements set by the **Labeling and Trademark Policy** and allows UTZ to keep an overview of which products are on the market in which countries.

Please find all the information about labeling approval rules and process in our **E-course**.

1.1 Labeling rules

The labeling rules can be found in the **Labeling and Trademark Policy**. The claims and logos that can be used depend on the traceability level of the UTZ certified product you purchase.

1.2 UTZ logos

The UTZ logos can be downloaded under **6. UTZ logos** in the download section of the **Good Inside Portal**. You can select the logo per commodity.
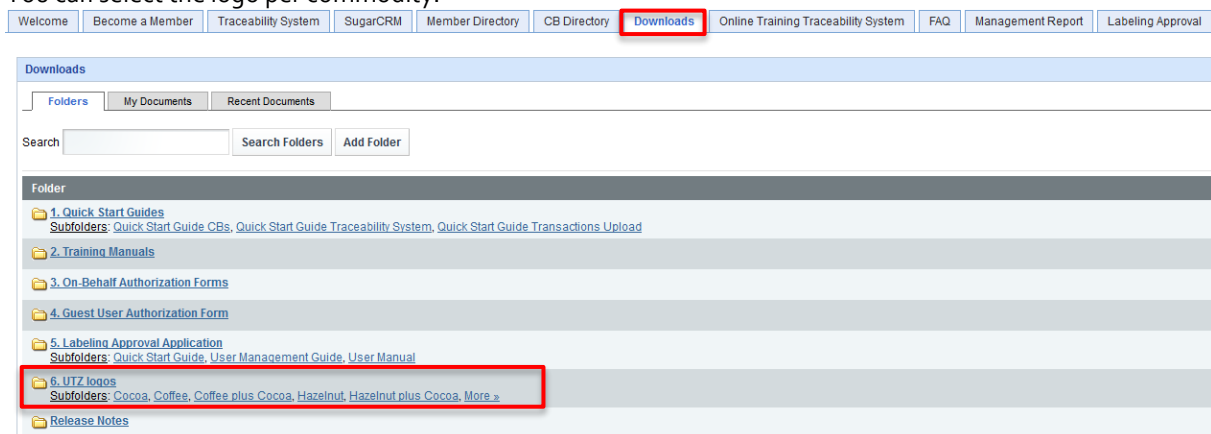
1.3 Who can submit a request?

Labeling Approval Requests can be submitted by either suppliers (e.g. roasters, manufacturers, blenders/packers) or brand owners.

The labeling approval system makes it easy for everyone to keep track of requests in their Good Inside Portal accounts. Additionally, if a brand owner submits a request, both the brand owner and the supplier will be notified by email when it has been approved and will be able to download the approval letter.
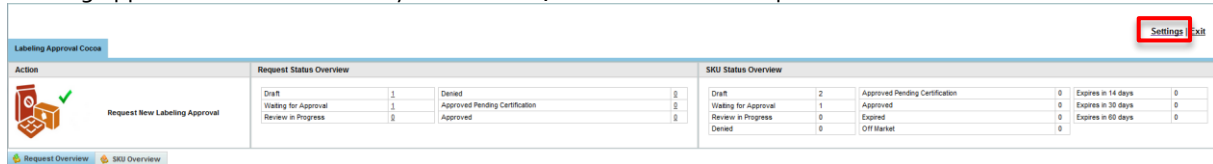
1.4 Approval validity

Label approval requests are valid for 365 days from the date on which they were approved. This date is also mentioned in the label approval letter. You can extend your SKU at the click of a button if your product is still on the market after this time. The start date of this extension is the date that you requested the extension and an adapted approval letter will be available. If the product is no longer on the market, you are kindly requested to take the SKU off market (see **5.2 SKU overview** for instructions).

1.5 Browser compatibility

The Good Inside Portal is compatible with all browsers but works best with the latest version of Mozilla Firefox and Google Chrome.
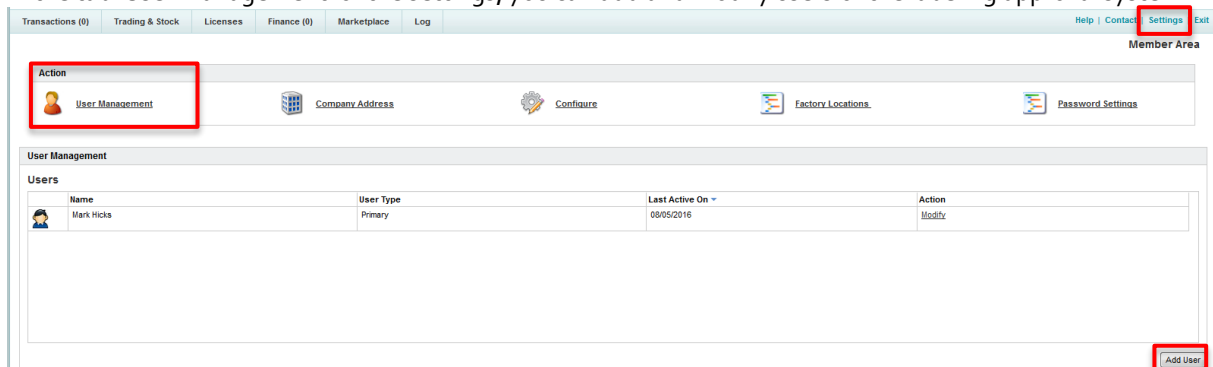
2. Manage your settings (primary users only)

The settings area is only visible to primary users of the account and can be found in the top right corner of the labeling approval dashboard. Once you click on it, a new window will open.

2.1 Add and manage users

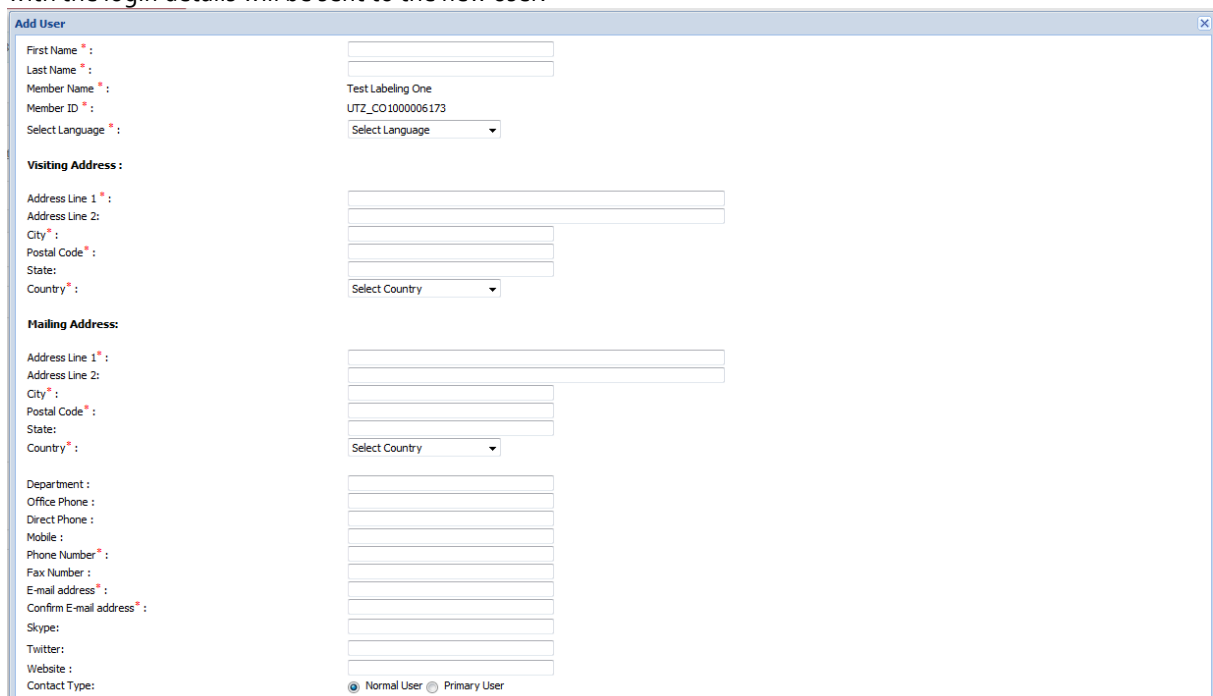In the tab 'User Management' of the settings, you can add and modify users of the labeling approval system.
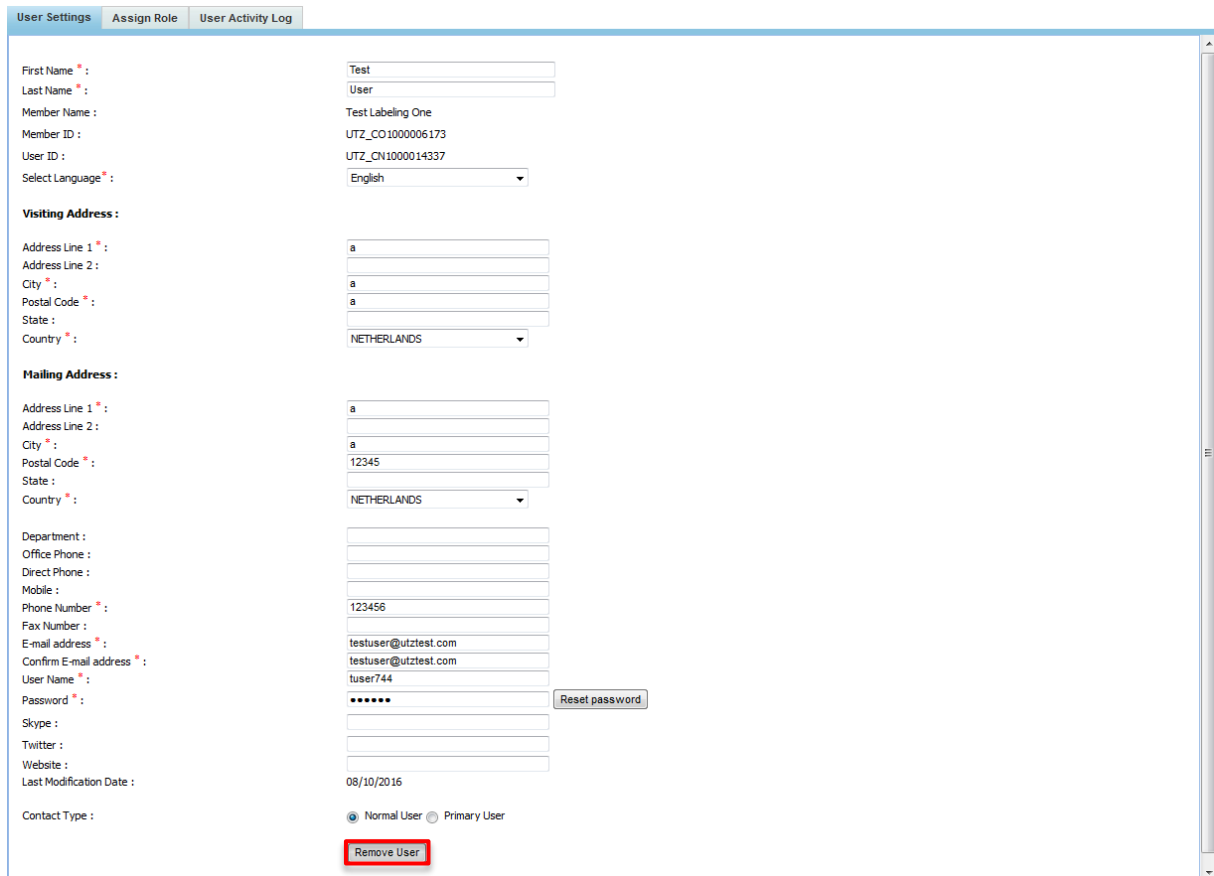

Add users: click on 'Add User' in the lower right corner. A new window opens. Fill in the user details including the preferred language, select the contact type and click OK. An automatic generated e-mail with the login details will be sent to the new user.
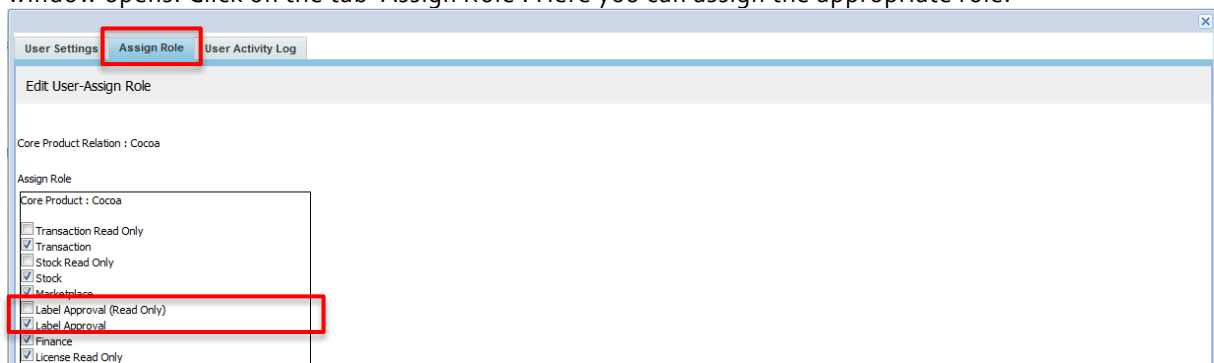
Remove users: click on 'Modify' next to the user you want to remove. A new window opens. Click on the tab 'User Settings'. Go to the bottom of your screen and click on 'Remove User'. Click on ok to confirm the removal of the user.

Assign labeling approval role: click on 'Modify' next to the user you want to assign a role to. A new window opens. Click on the tab 'Assign Role'. Here you can assign the appropriate role.
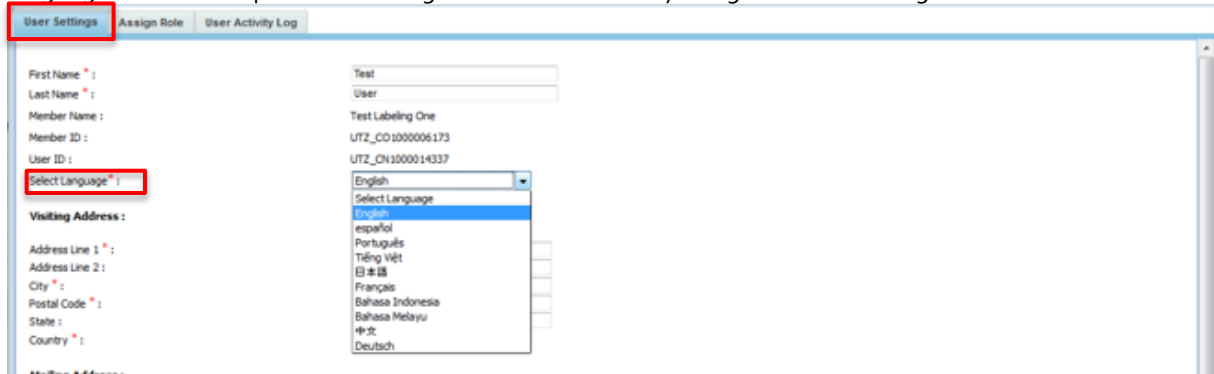

Good to know
If a user is only involved in the labeling approval process, make sure that only the labeling approval roles are assigned.

2.2 Language settings

The labeling approval system is available in English, German, and Japanese. To change the language you see in the account, click on 'User Management', click on 'modify' next to your own name, and select your preferred language from the drop list. This change will be visible once you signed out and in again.
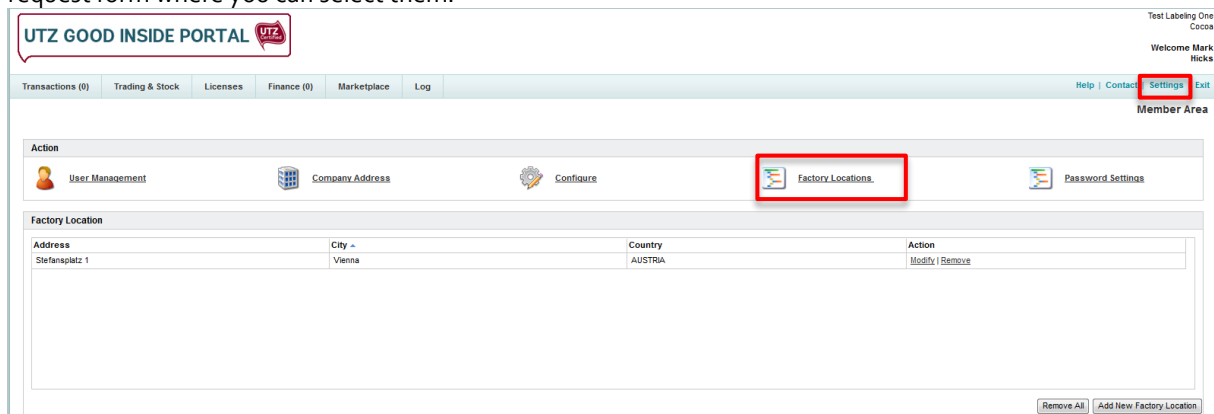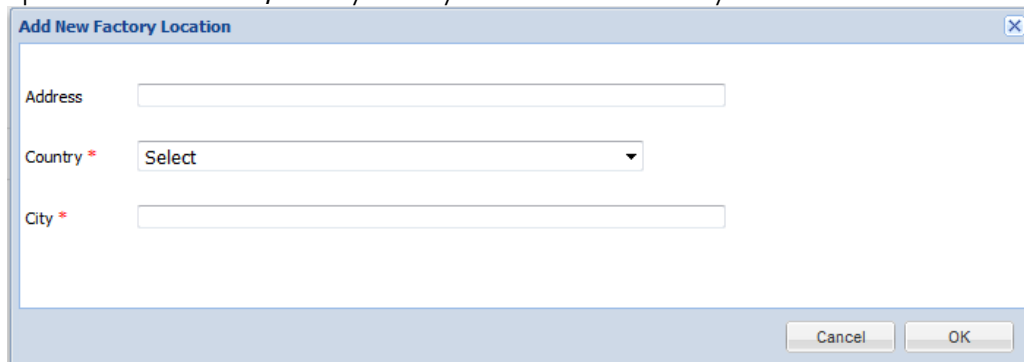

> **Good to know**
> The drop-down list under 'Select Language' will show more languages. If you select a language that is not available, the labeling approval system will be shown in English (default language).

2.3 Add factory location

In the tab 'Factory Location' of the settings, you can add and modify the location of the factory where the products were produced. The factory location will then appear in a drop down list in the labeling approval request form where you can select them.

Add new factory location: click on 'Add New Factory Location' in the lower right corner. A new window will open. Fill in the address, country and city and click ok. The factory location will be added to the list.

Modify factory location: click on 'Modify' next to the factory location you would like to modify. Make the necessary changes and click on ok.

Factory Location			
Address	**City** ▲	**Country**	**Action**
Stefansplatz 1	Vienna	AUSTRIA	Modify Remove

Remove factory location: click on 'Remove' next to the factory location you would like to remove. Click on ok to confirm the removal.

Factory Location			
Address	**City** ▲	**Country**	**Action**
Stefansplatz 1	Vienna	AUSTRIA	Modify | Remove

3. Submit a Labeling Approval Request

This chapter will explain step by step how to submit a new labeling approval request.

Please note that the screenshots used in this chapter are for a labeling approval request for cocoa. The form for each commodity will show the relevant type of supplier. In sections where the request forms for coffee and tea are different from the request for cocoa, this will be indicated.

3.1 Log in
Go to **www.goodinsideportal.org**. Here, you can log in with your login credentials.

3.2 Enter the labeling approval system
Click on the 'Labeling Approval' tab.

> **Good to know**
> If you do not see the labeling approval tab, ask the primary user of your account to assign you the labeling role or contact **techsupport@utz.org**

You will see the following screen. Click on the link 'Click here to go to the Labeling Approval dashboard' to enter the system.

The labeling approval dashboard will be displayed. Select cocoa, coffee or tea/rooibos by clicking on the corresponding tab. Click on 'Request New Labeling Approval'. This will open the Labeling Approval Request Form.
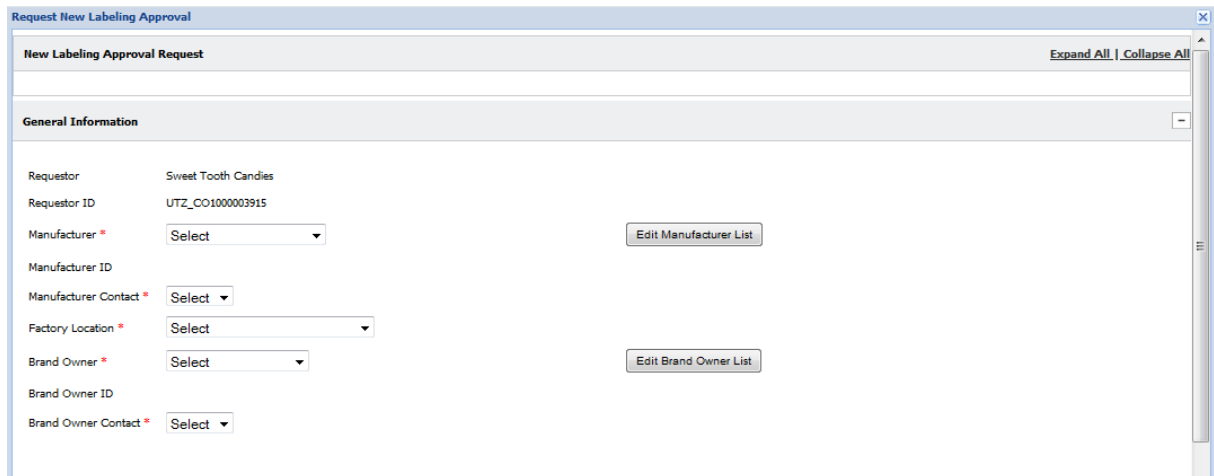
3.3 The labeling approval request form – general information

The labeling approval request form consists of various sections. We will zoom into the different sections. The first section that we will zoom into is the section 'General Information'.

Requestor: your company name will automatically be entered

Requestor ID: your member ID will automatically be entered

Manufacturer: the drop down list of manufacturers will show those used in previous requests submitted via the online form.

> **Good to know**
> If this is the first time that you are using the form, no manufacturers will be listed yet, even if your company is the manufacturer.

Add manufacturer: to add manufacturers to the list, click on 'Edit Manufacturer List'. The Edit Manufacturer window will open and display your current list of manufacturers. To add a manufacturer to the list, click on 'Add Manufacturer'.
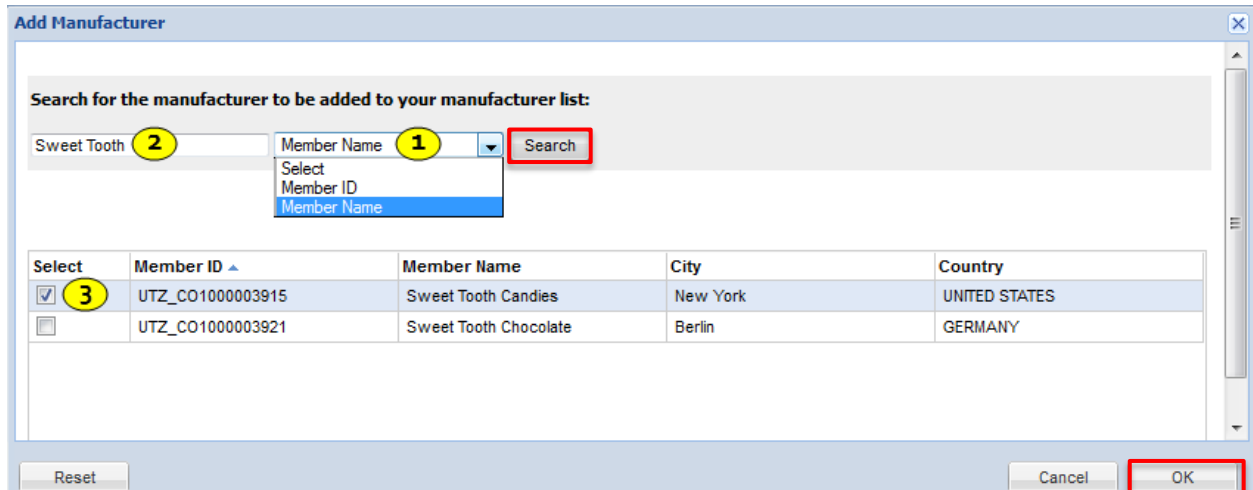
The 'Add Manufacturer' window will open. You can search for all UTZ certified manufacturers including yourself if you are the company manufacturing the products.

1. Select whether you wish to search by Member ID or Member Name;
2. Type all or part of the Member ID/Member ID and click on 'Search'
3. A list of manufacturers will be displayed. Tick the box to select the relevant manufacturer and click on 'OK'
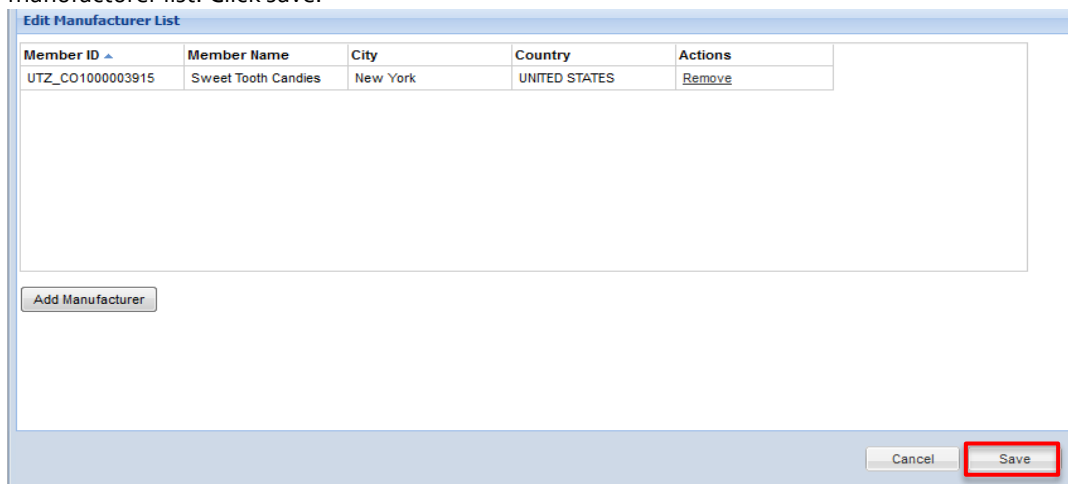
You will return to the 'Edit Manufacturer List' window. Your selected manufacturer will now appear in your manufacturer list. Click save.

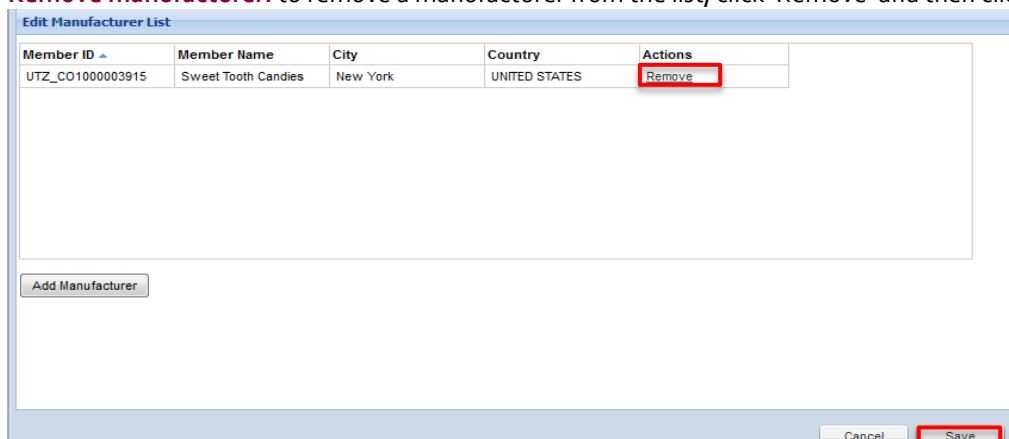**Remove manufacturer:** to remove a manufacturer from the list, click 'Remove' and then click 'Save'.
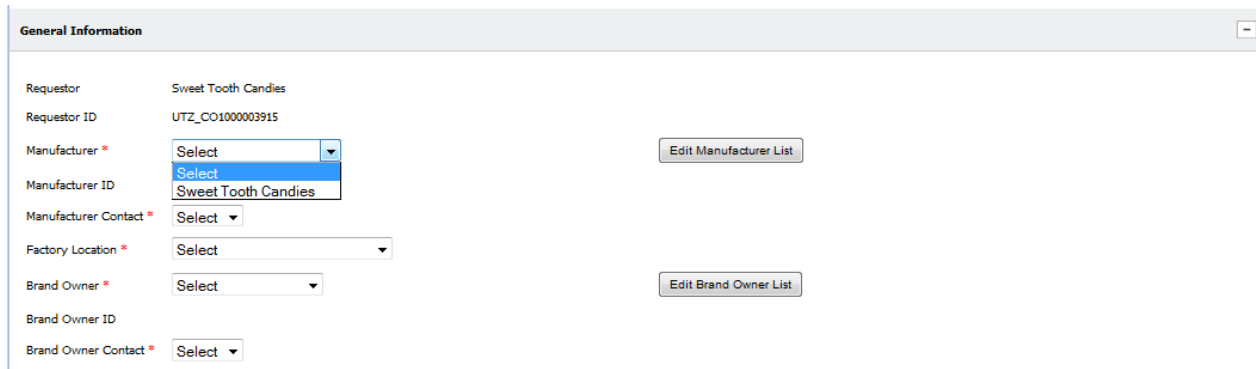
You will return to the Labeling Approval Request form. The Manufacturer will now appear in the drop down list. Select the relevant manufacturer.

Manufacturer ID: the manufacturer ID will automatically appear once the Manufacturer has been selected.

Manufacturer contact: select the relevant contact person from the drop down list. People who have been added as users of their company account, will appear in this list.

Factory location: select the factory location from the drop down list. If no factory locations appear on the list, please add it in the settings area (click on **add factory location** for instructions) Click on 'Save as Draft' to save the form so you can return to it later.
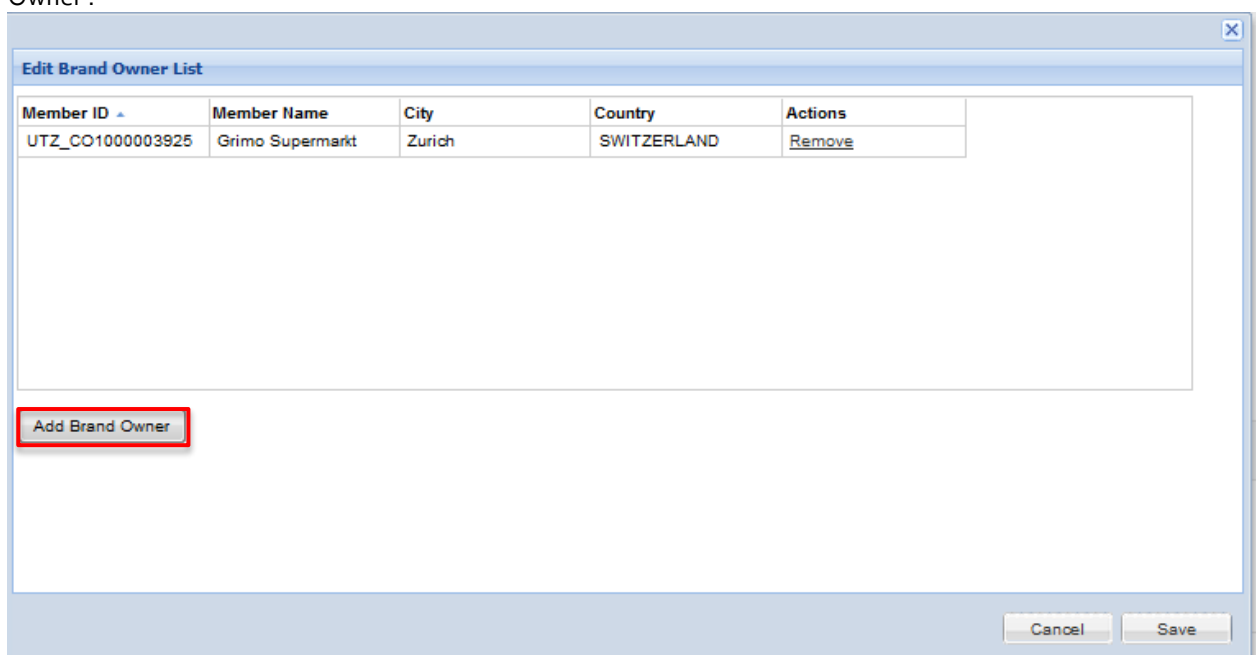
Brand owner: the drop down list of brand owners will show those used in previous requests submitted via the online form.

Good to know
If this is the first time that you are using the form, no brand owners will be listed yet, even if your company is the brand owner.
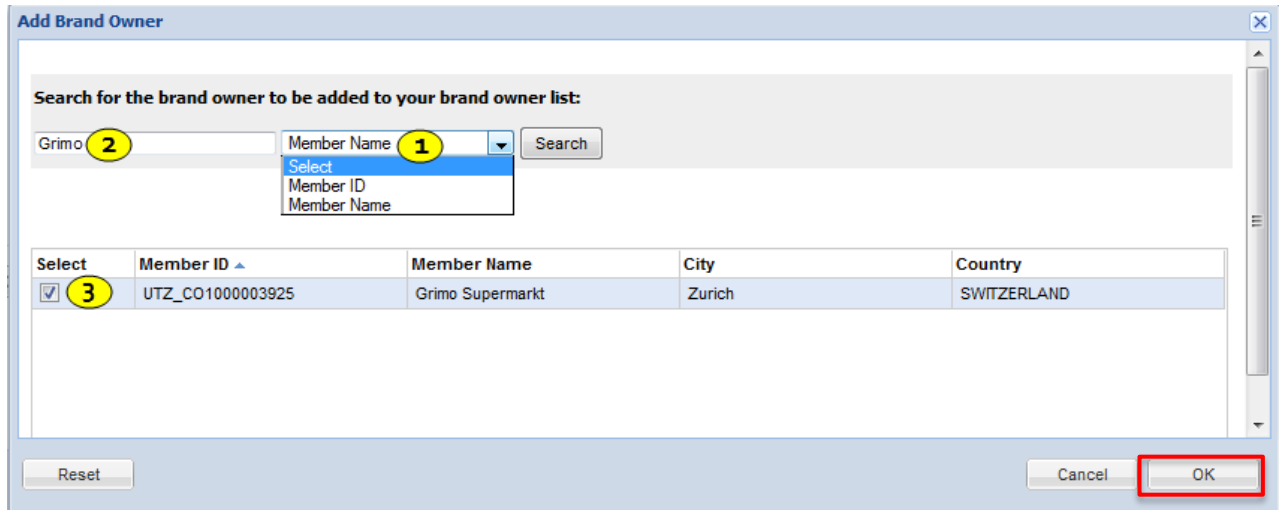

Add brand owner: to add brand owners to the list, click on 'Brand Owner List'. The Brand Owner List window will open, and display your current list of brand owners. To add a brand owner to the list click on 'Add Brand Owner'.

The 'Add Brand Owner' window will open. You can search for all registered brand owners including yourself if you are the brand owner of the products.

1. Select whether you wish to search by Member ID or Member Name;
2. Type all or part of the Member ID/Member Name and click on 'Search'
3. A list of brand owners will be displayed. Tick the box to select the relevant brand owner and click on 'OK'

You will return to the 'Edit Brand Owner List' window. Your selected brand owner will now appear in your brand owner list. Click save.

Remove brand owner: to remove a brand owner from the list, click 'Remove' and then click 'Save'.

You will return to the Labeling Approval Request form. The brand owner will now appear in the drop down list in the Labeling Approval Request form. Select the relevant brand owner.

Brand Owner ID: the Brand Owner ID will automatically be filled in once the brand owner has been selected.

Brand Owner Contact: select the relevant contact person from the drop down list. People who have been added as users of their company account will appear in this list.

3.4 The labeling approval request form – Traceability level/Content

The next section on the form is called 'Traceability Level' with cocoa products and 'Content' for coffee products. For tea products, you can add extra information in the section SKU Information.

Traceability level (cocoa products): in the section 'Traceability Level' you can select the traceability level.

Content (coffee products): in the section 'Content' you must indicate whether there is more or less than 60% coffee in the product and whether or not the coffee is fully certified (>90%)

Content	−

Is there more than 60% coffee in the product? *
- ○ Yes
- ○ No

Is the coffee fully (≥90%) UTZ certified? *
- ○ Yes
- ○ No

3.5 The labeling approval request form – SKU information
In the section 'SKU Information' you can fill in information about the SKUs and can upload the SKUs

Logo size: enter the size of the UTZ logo on your packaging in millimetres. The minimum logo size is 11 mm and the maximum logo size is half the logo of the brand. If the packaging carries multiple logos that vary in size, enter all sizes separated by commas.

To add SKUS, please click on the link 'Add SKU's'

SKU Information

Logo Size (mm) *	12, 16
SKUs (0) *	Add SKUs

The window 'Add SKUs' opens. Click in the table to fill in the brand name, type/taste, weight, article number, and EAN number for each SKU. Article number and EAN number are not mandatory.

Select Yes or Now in the row 'New UTZ Certified Labeled SKU'. Choose Yes if it is the first time that this product is labeled with an UTZ logo/claim and choose No if this product is already on the market but you are requesting approvals for a changed layout.

If you need more rows, click on 'Add More SKUs'.

After you filled in this information, click on 'Add/Modify Distribution Countries'.
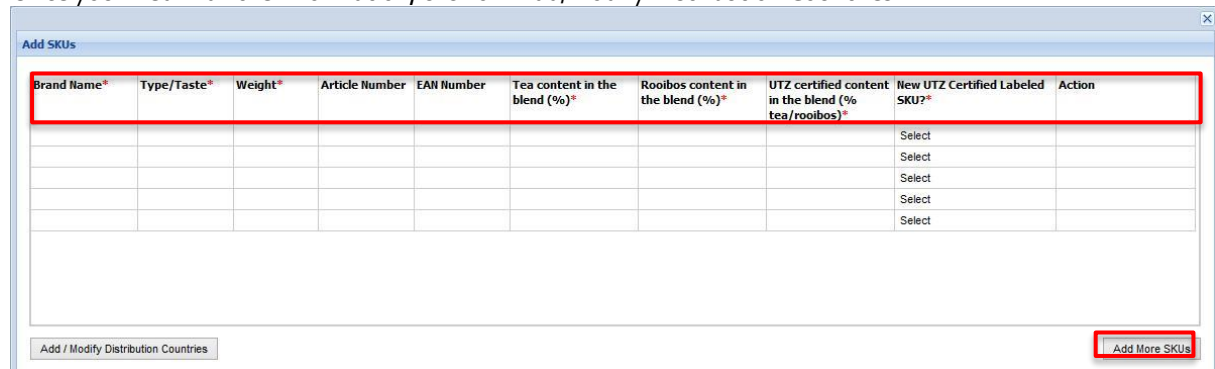
Add SKUs

Brand Name*	Type/Taste*	Weight*	Article Number	EAN Number	New UTZ Certified Labeled SKU?*	Action
Delicious Chocolate	dark	100g	1122	001	Yes	Remove SKU
Delicious Chocolate	milk	100g	1133	002	Yes	Remove SKU
Delicious Chocolate	white	100g	1144	003	Yes	Remove SKU
					Select	
					Select	

Add / Modify Distribution Countries

Add / Modify Artwork

Add More SKUs

For tea products, the window 'Add SKUs' looks a bit different. Here you also need to fill in the fields 'Tea content in the blend (%)', 'Rooibos content in the blend (%)', and 'UTZ certified content in the blend (% tea/rooibos)'.

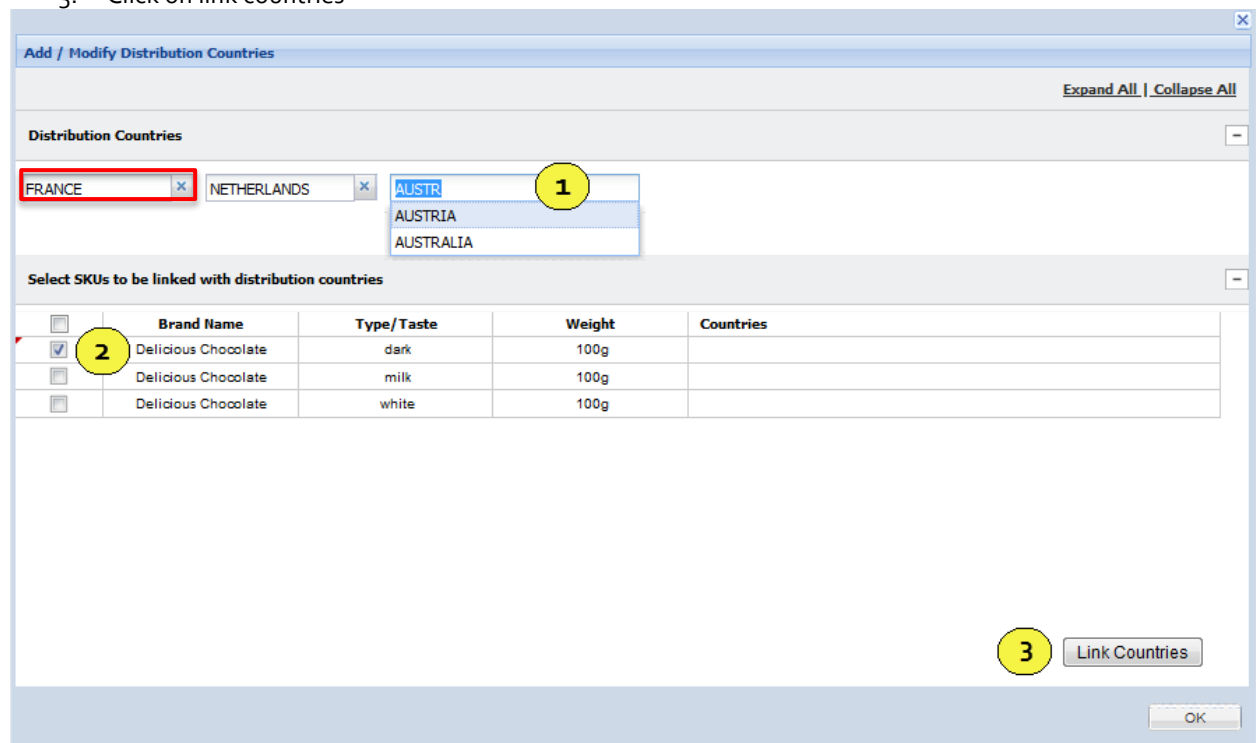Once you filled in all the information, click on 'Add/Modify Distribution Countries'

> **Good to know**
> If your tea/rooibos product also contains herbal tea, the labeling approval takes place outside of the system.

The window 'Add / Modify Distribution Countries' will open and display your list of entered SKUs. You can enter as many distribution countries as necessary. It is possible to link different distribution countries to each SKU.
1. Click in the box and begin typing the first distribution country. As you type, a drop down box will appear. Select the relevant distribution country.
2. Tick the boxes to select the SKUs to be linked with these countries
3. Click on link countries

The distribution countries linked to each SKU will be displayed in the table. As you can see, the first SKU is now linked to France, the Netherlands, and Austria.

More distribution countries can be added and linked to your SKUs. Type the country names into the box, tick the boxes to select the SKUs, then click on 'Link Countries'. As you can see, the second and third SKUs are now linked to France, the Netherlands, Austria and Germany.

To remove any of the distribution countries, click the 'x' in each individual box.

When you have linked all distribution countries to each SKU, click ok.

You will return to the 'Add SKUs' window. To link artwork to each SKU, click on Add / Modify Artwork.

The window 'Art / Modify Artwork' will open and display your list of SKUs.
1. Upload an artwork file by browsing the files on your computer. You can choose from the following formats: PDF, JPEG or PNG (maximum file size per SKU is 99 mb). Click 'Upload'
2. The uploaded artwork will be displayed. Click in the boxes to select an artwork file and the SKUs you want to link to this artwork file
3. Click on 'Link Artwork Files'

The artwork files linked to each SKU will be displayed in the table. When you have linked all the artwork files to the SKUs, click 'OK'.
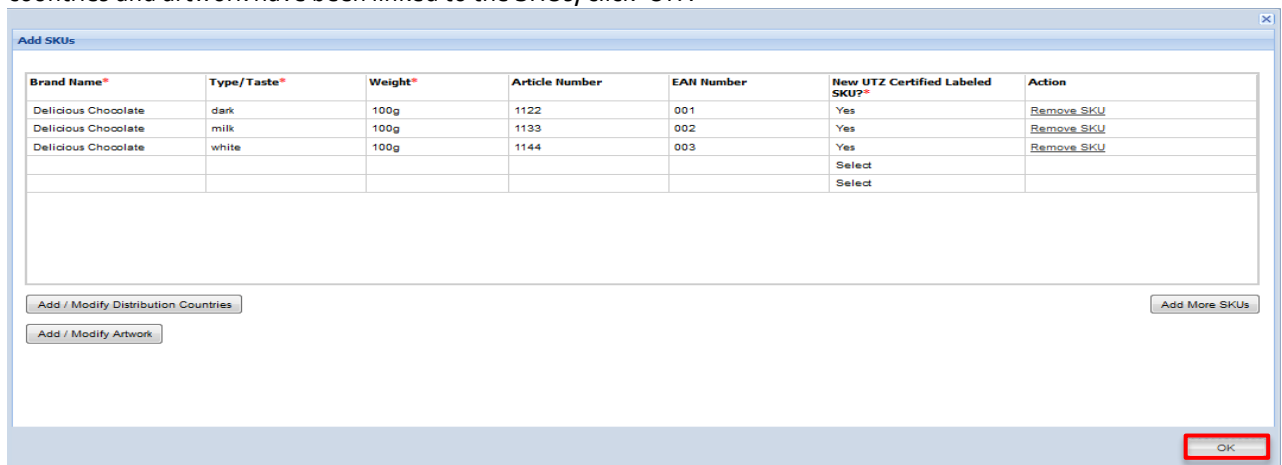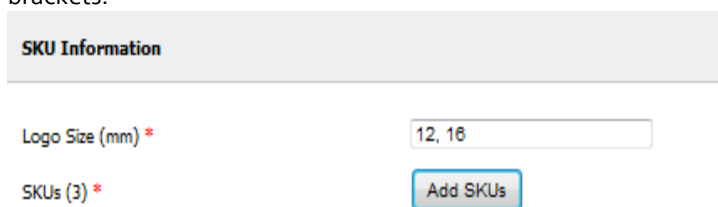
You will return to the 'Add SKUs' window. When all the information has been added, and distribution countries and artwork have been linked to the SKUs, click 'OK'.

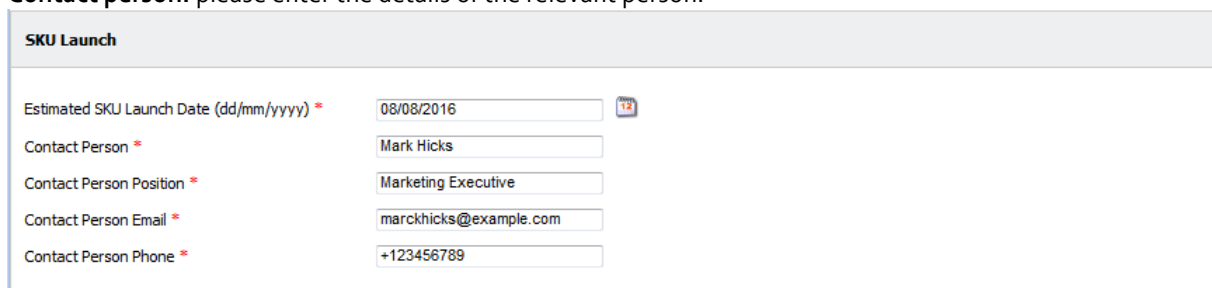You will return to the Labeling Approval Request form. The number of SKUs added will be displayed in brackets.

3.6 The labeling approval request form – SKU launch

In the section 'SKU Launch' you can fill in the estimated SKU launch date and the contact person.

Estimated SKU Launch Date (dd/mm/yyyy): Enter the date on which the SKUs will be launched. If you have SKUs with different launch dates, either choose an approximate date or submit them in separate requests.

Contact person: please enter the details of the relevant person.

3.7 The labeling approval request form – Request approval

In the section 'Request Approval' you can enter the following information:

Remarks: any additional remarks for the Member Support Team can be included here.

Request Date: the request date will be displayed automatically.

Requestor Contact: your name will be displayed automatically.

Requestor Office Country: your country will be displayed automatically

Please fill in 'Yes' or 'No' if you would like to receive a notification request on approval or denial of your request. If you also want somebody else to receive a notification e-mail on approval or denial of the request, you can fill in the e-mail address once you selected 'Yes'.
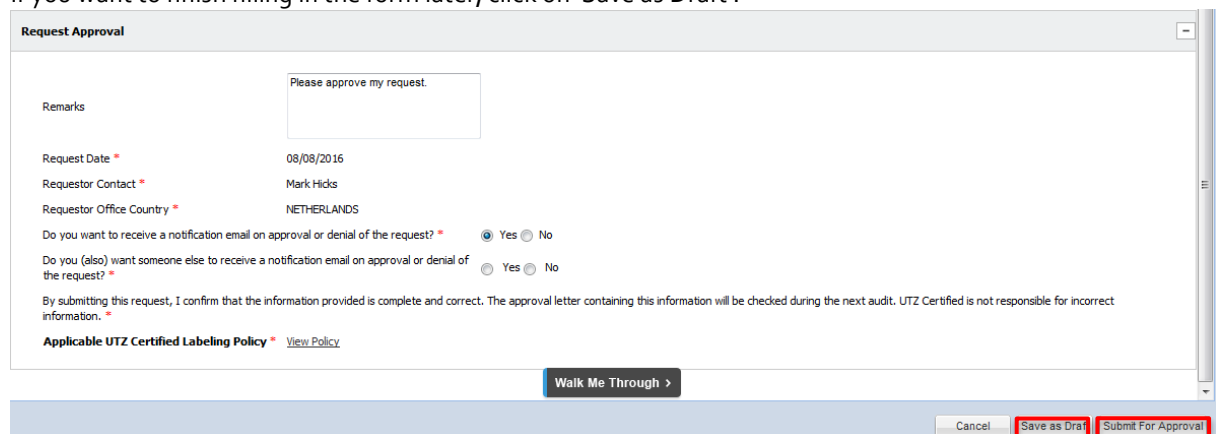
> **Good to know**
> If you choose to receive notification e-mails, your supplier/brand owner will also receive a notification e-mail upon approval. If the request is denied, they will not be notified.
>
> If you choose not to receive notification e-mails, no notification e-mails will be sent to your supplier/brand owner.

When you have filled in all the relevant information, click on 'Submit for Approval'. By submitting your request you confirm that you agree to the declaration and the labeling & trademark policy.

If you want to finish filling in the form later, click on 'Save as Draft'.

4. Processing your labeling approval request

Once you submitted your request, it will be reviewed by the Member Support Team within 5 working days. There are three possible outcomes: approved, approved pending certification, and denied.

Request approved: when a request is approved, the approval letter will be generated automatically. Both the brand owner and the supplier (roaster, manufacturer, packer/blender) will be able to download the letter in their labeling dashboard on the request overview (please find the instructions under **5.2 SKU overview**)

If you indicated in the request form that you would like to receive an e-mail notification upon approval, this will be automatically sent to you, the supplier/brand owner, and the other additional e-mail address in the last section of the request form.

Request approved pending certification: the request receives this status when the supplier (roaster, manufacturer, packer/blender) does not have a valid license (yet). Once the license has been activated, the status will automatically change to 'approved' and the approval letter will be automatically generated.

Please note that products can only be launched on the market once the supplier has a valid license.

Denied: if a request is denied and you requested an e-mail notification, this will be automatically sent to you, the supplier/brand owner, and the other additional e-mail address entered. The notification e-mail will contain information on what needs to be changed for the request to be approved.
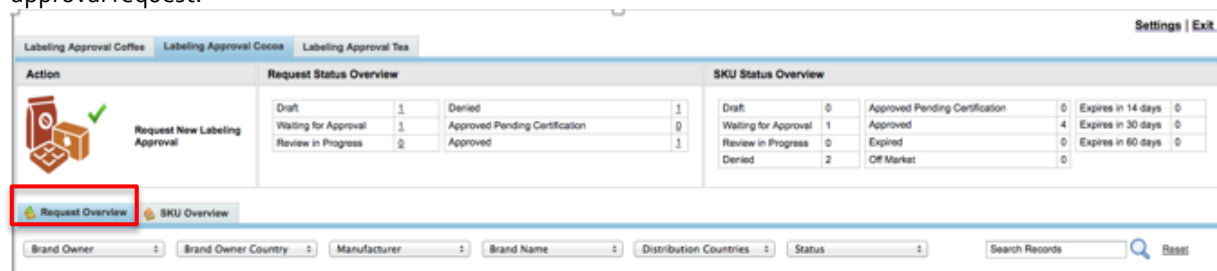
When you return to the Labeling Approval Dashboard, you will be able to see the remarks from UTZ and you can make the necessary changes by clicking on 'Modify' (please find the instructions under **5.2 SKU overview**)

5. Labeling approval dashboard – View and manage requests and SKUS
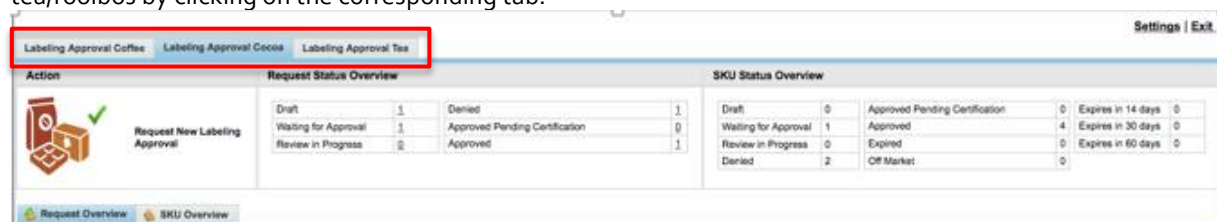
On the labeling approval dashboard you can find more information on your labeling approval request on two levels: the request overview and the SKU overview.

5.1 Request overview
On the request overview, you will find an overview of all your requests. Each row corresponds to a labeling approval request.

Labeling approval per commodity: if you deal with more than one commodity, select cocoa, coffee or tea/rooibos by clicking on the corresponding tab.

Request Status Overview: this is an overview of all your requests per status. If you click on the numbers, the selected requests will be shown in your overview.
- **Draft:** a new labeling approval request has been made but it has not been submitted yet;
- **Waiting for approval:** request has been submitted but has not been processed yet;
- **Review in progress:** request has been submitted and is being processed;
- **Denied:** request has been denied. The requestor is asked to make the necessary changes and resubmit the request;
- **Approved pending certification:** request has been approved. The approval will only be valid once the supplier has a valid license. The status will than automatically change to 'approved';
- **Approved:** request has approved and the approval is valid.

Filter: you can filter your requests on 'Brand Owner', 'Brand Owner Country', 'Manufacturer', 'Brand Name', 'Distribution Countries', 'Status', and a certain period

Search function: in this field you can search in your requests on request ID (LAR-CO/CF/TE-....)

Column 'Action': in the column 'Action' you can perform the following actions, based on the status of your request:

- **Modify**: if you click on this link you can modify a request that has the status 'denied' or 'waiting for approval'
  - o Click on 'Modify' to view the Labeling Approval Request form;
  - o Edit the information and/or artwork as appropriate
  - o If your original request was denied, the reasons for denial or remarks will be shown in the 'remarks' box at the bottom of the request form. The history of remarks between you and UTZ can be viewed by clicking on the link 'View History' in the validation section at the bottom of the request form;
  - o For detailed instructions for each section of the form, see **3. Submit a Labeling Approval Request**.
- **Withdraw**: if you click on this link you can withdraw a request. This option is only available for requests that have the status 'denied' or 'waiting for approval'. Withdrawn requests will disappear from the overview
- **Copy**: sometimes you may wish to submit a new labeling approval request with many of the same details of an existing request. Click on 'Copy' to copy the details to a new request. This option is only available for requests that have the status 'Approved' or 'Approved pending certification'

Column 'View': in the column 'view' you can view the following information, based on the status of your request:

- **Request details:** here you can find the labeling approval request form of this specific request including the artwork and the countries of distribution
- **SKU details:** here you can find the SKU details of this specific request
- **Approval letter:** here you can download the approval letter of this specific request. This is only possible when your request has the status 'approved'

Print: if you click on print, you are able to print your request overview. Please note that it is also possible to filter your requests first.

Export to Excel: this button gives you the opportunity to export the request overview to Excel. Please note that it is also possible to filter your requests first.

5.2 SKU overview
On the SKU overview, you will find an overview of all your SKUs. Each row corresponds to a SKU.

Labeling approval per commodity: if you deal with more than one commodity, select cocoa, coffee or tea/rooibos by clicking on the corresponding tab.

SKU Status Overview (status): in the SKU status overview you find both an overview of the status and validity of your SKUs. If you click on the numbers, the selected SKUs will be shown in your overview. We will first take a look at the different statuses:
- **Draft:** a new request has been made but has not been submitted yet;
- **Waiting for approval:** request has been submitted but has not been processed yet;
- **Review in progress:** request has been submitted and is being processed;
- **Denied:** request has been denied. The requestor is asked to make the necessary changes and resubmit the request;
- **Approved pending certification:** request has been approved. The approval will only be valid once the supplier has a valid license. The status will than automatically change to 'Approved';
- **Approved:** request has been approved and SKUs are valid;
- **Expired:** the validity period of the approved SKU has expired, hence the approval is no longer valid;
- **Off market:** the SKU is no longer on the market

Good to know
The numbers you see behind the different statuses, refer to the amount of SKUs in question

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SKU Status Overview (validity): in the SKU overview you can also see the validity of your SKUs. If you click on the numbers, the selected SKUs will be shown in your overview.
- **Expires in 14 days:** the validity of these SKUs will expire in 14 days;
- **Expires in 30 days:** the validity of these SKUs will expire in 30 days;
- **Expires in 60 days:** the validity of these SKUs will expire in 60 days

Filter requests: you can filter your requests on 'Brand Owner', 'Manufacturer', 'Brand Name', 'Distribution Countries', 'Status' and a certain period.

Search function: the search function in the SKU Overview is limited. We recommend you to use the filters.

Column Action: in the column action you can either extend an individual SKU or take it off market
- **Extend SKU:** click on the link 'Extend SKU'. A new approval letter will be generated and downloadable. The start date of this new approval is the same date that you requested the extension.
- **Take SKU Off Market**: click on the link 'Take SKU Off Market'.

Extend Multiple SKUs: if you want to extend the validity of multiple SKUs at the time, click on the button 'Extend Multiple SKUs'.

The window 'Extend Approval Validity of SKU' opens. This overview shows all your valid SKUs. Tick the boxes of the ones that you would like to extend and click on 'OK'. A new approval letter will be generated and downloadable. The start date of this new approval is the same date that you requested the extension.

Take Multiple SKUs Off Market: if you want to take multiple SKUs off market at the same time, click on the button 'Take Multiple SKUs Off Market' and select the SKUs that you would like to take off market.

The window 'Take Multiple SKUs Off Market' will open. This overview shows all your valid SKUs. Tick the boxes of the ones you would like to take off market and click on 'OK'.

Print: if you click on print, you are able to print your SKU overview. Please note that it is also possible to filter your SKUs first.

Export to Excel: this button gives you the opportunity to export the SKU overview to Excel. Please note that it is also possible to filter your SKUs first.

6. More Information and Support

Please find all the information about labeling approval rules and process in our **E-course.**

Training materials including this manual and a quick start guide can be found in the download section of the Good Inside Portal under point '5. Labeling Approval System'

CONTACT US

For questions regarding the labeling approval process or guidelines:

✉ **membersupport@utz.org**   ☎ Cocoa/hazelnut: + 31 20 530 8097 | Coffee/tea: +31 20 530 8096

For questions regarding the labeling approval system:

✉ **techsupport@utz.org**   ☎ Cocoa/hazelnut: + 31 20 820 8965 | Coffee/tea: +31 20 820 8958