

# INATrace

# USER GUIDE

FOR BUYER COMPANIES



# INATrace

The Traceability Tool for Sustainable Supply Chains

User Guide 2025



# Table of Content

<u>Executive Summary</u>	05
<u>INATrace Background</u>	
<u>Objectives</u>	
<u>INATrace at a glance</u>	
<b><u>Chapter 1. Getting Started with INATrace</u></b>	07
<u>1.1 Register in the system</u>	
<u>1.2 Access to the system</u>	
<u>1.3 Overview of the user interface</u>	
<u>1.4 Language settings</u>	
<b><u>Chapter 2. Product settings</u></b>	13
<u>2.1 General product settings</u>	
<u>2.2 QR Label settings</u>	
<u>2.3 Stakeholders</u>	
<u>2.4 Final products</u>	
<b><u>Chapter 3. Orders</u></b>	21
<u>3.1 Place an order to your supplier</u>	
<u>3.2 Approve your supplier's order fulfillment</u>	
<b><u>Chapter 4. Processing module</u></b>	34
<u>4.1 Transfers to other facilities</u>	
<u>4.2 Create QR Codes</u>	
<u>4.3 Processing into final products</u>	
<b><u>Chapter 5. Payment module</u></b>	48
<u>5.1 Record an order payment</u>	
<b><u>Chapter 6. All Stock module</u></b>	53
<u>6.1 View stock and batch history</u>	

**Chapter 7. Dashboard** \_\_\_\_\_ 56  
    7.1 Processing dashboard

**Chapter 8. Company configuration** \_\_\_\_\_ 59  
    8.1 Access your company profile  
    8.2 Edit Company information  
    8.3 Add/Edit company facility  
    8.4 Add/Edit processing actions

# INATrace Background



- INATrace is a digital open-source solution that puts people first. With the aim of improving the economic situation of smallholder farmers, INATrace focuses on the traceability of global supply chains. Better payment for producers at the beginning of the supply chain can only be secured if it becomes clear how little they receive for the raw material produced compared to other actors.
- Data on the supply chain, such as what prices are paid, which processing steps take place and which actors are involved, is stored digitally and, if desired, can also be viewed by consumers via a QR code. In addition, new functions for recording farmers' field polygons and satellite-based forest monitoring are being developed. Thus, the data collected in INATrace can be used to fulfil the due diligence requirements for the new [EU Deforestation Regulation \(EUDR\)](#).
- Companies in the processing, wholesale and retail sectors are being made responsible for their own supply chains with the introduction of the [German Supply Chain Act \(LkSG\)](#) and the EU Regulation on Deforestation-Free Products (EUDR). Compliance with human rights and the protection of forests is indispensable, especially at the beginning of global supply chains. In the market for traceability solutions, which currently is very fragmented, INATrace consistently builds on the requirements of those at the beginning of supply chains.
- With INATrace, cooperatives have the opportunity to say goodbye to paper or Excel-based systems and make their processes fully transparent and digital. They also retain ownership over their data, strengthening their negotiating position vis-à-vis buyers of their products.

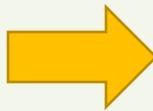
# Objectives



The objective of this user guide is to demonstrate step by step functionalities of all INATrace system modules to the users. The following are the specific objectives of this user guide:

- System users will understand the general background of INATrace system and how it enables traceability and transparency in agricultural value chains.
- Users will have a thorough understanding of INATrace and how it accommodates all value chain data.
- Users will have guidelines on how to use INATrace.

## INATrace at a glance



- It is a digital **traceability** tool.
- It makes **agricultural commodities traceable**.
- It enables **transparency** among value chain actors and to the end-consumers.
- It allows **end consumers to learn and give feedbacks** about the product.
- It helps **producers** to digitalize their operations and have **data** that they can analyze and present.



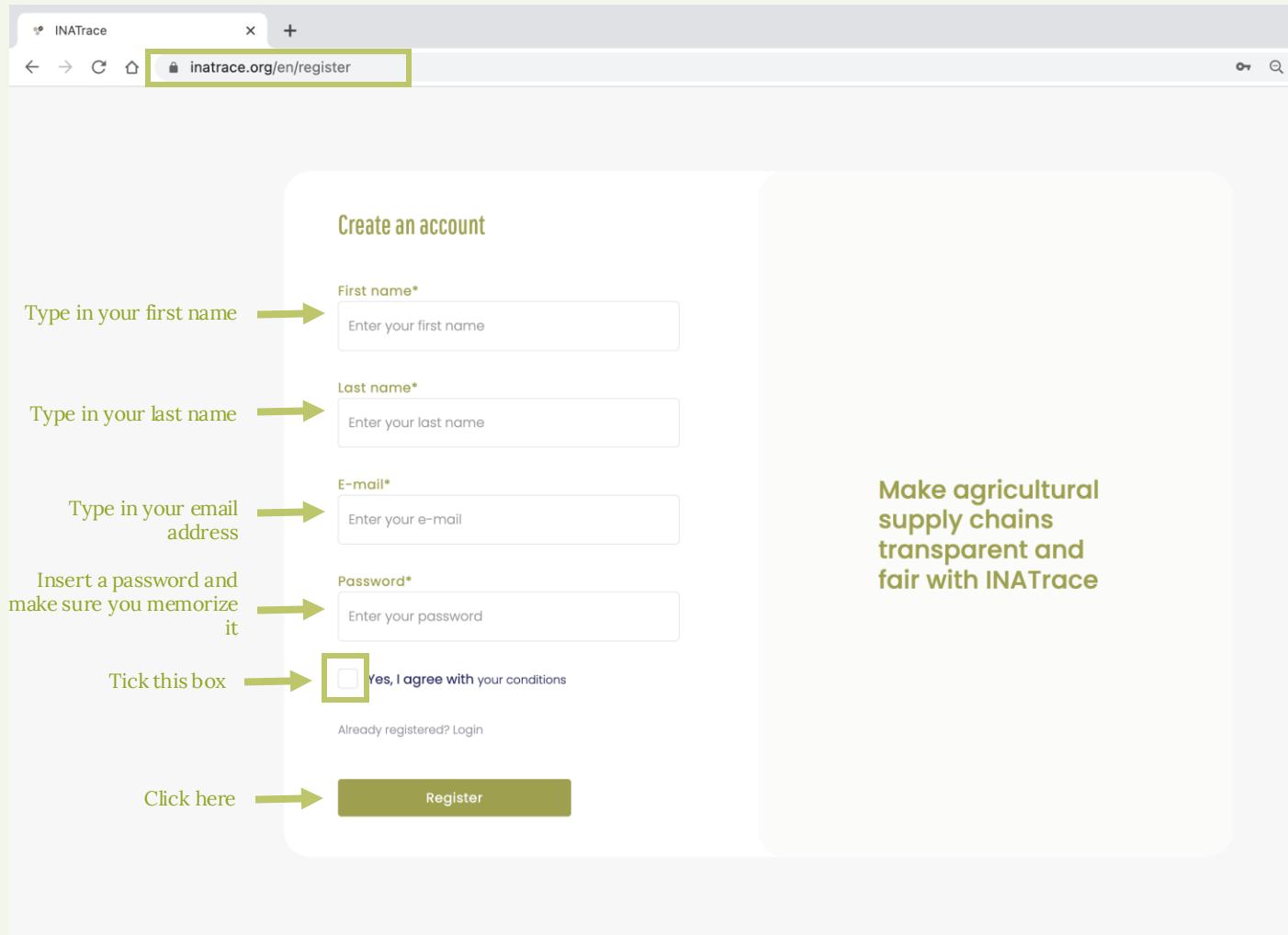
## Chapter 1.

# Getting Started with INATrace

INATrace is accessible using any modern browser (e.g. Chrome or Microsoft Edge) through the URL: <https://inatrace.org/>

## 1.1 Register in the system

In order to register a user account on INATrace, access <https://inatrace.org/en/register> and proceed by filling in the registration form below. After filling in all the required inputs, click on register and ask your INATrace contact person to approve your account.



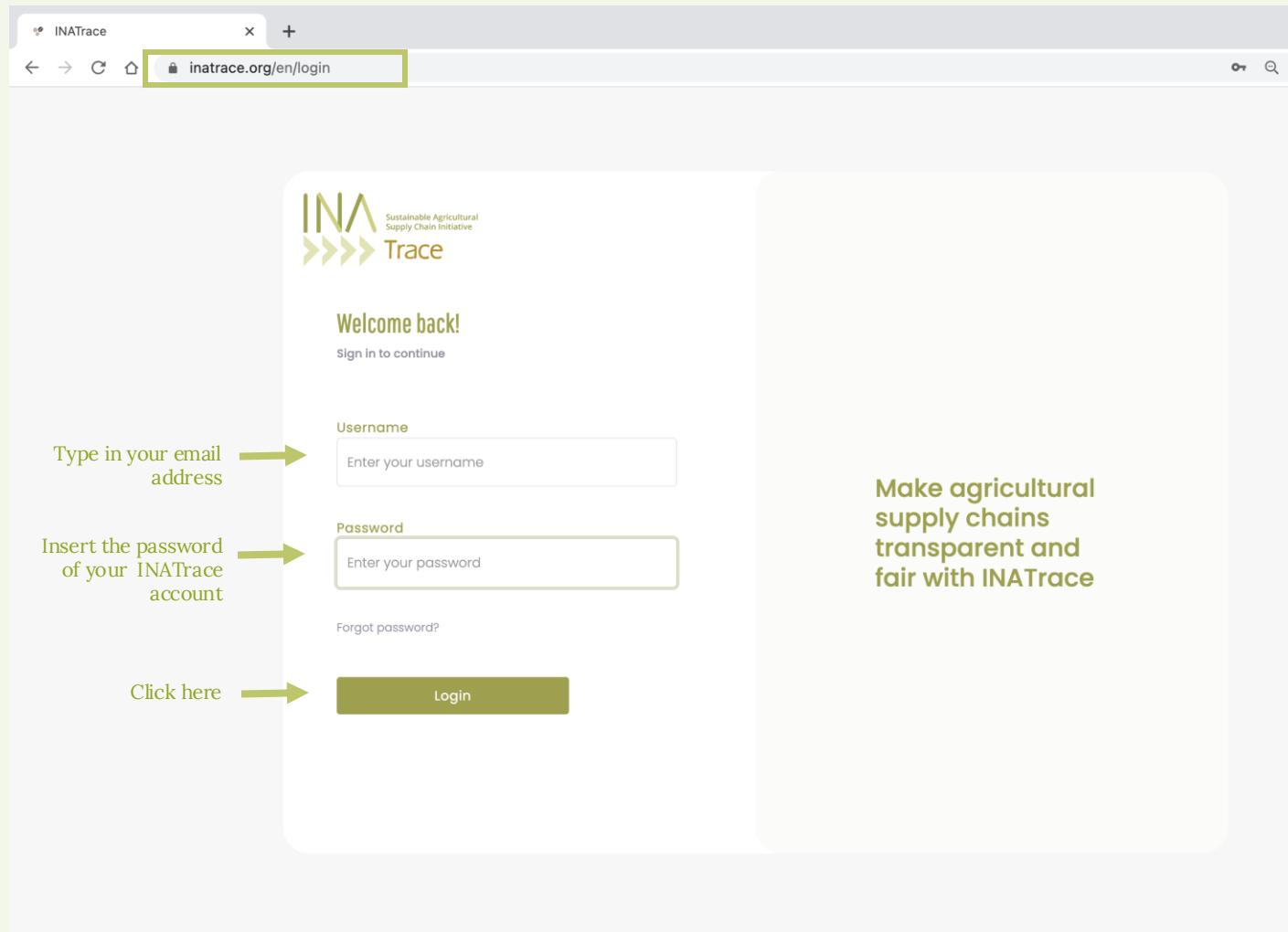
The screenshot shows a web browser window with the title bar 'INATrace' and the address bar containing 'inatrace.org/en/register'. The main content is a registration form titled 'Create an account'. The form fields are as follows:

- First name\***: A text input field with placeholder text 'Enter your first name'. A green arrow points to the left of the field with the text 'Type in your first name'.
- Last name\***: A text input field with placeholder text 'Enter your last name'. A green arrow points to the left of the field with the text 'Type in your last name'.
- E-mail\***: A text input field with placeholder text 'Enter your e-mail'. A green arrow points to the left of the field with the text 'Type in your email address'.
- Password\***: A text input field with placeholder text 'Enter your password'. A green arrow points to the left of the field with the text 'Insert a password and make sure you memorize it'.
- Agreement**: A checkbox labeled 'Yes, I agree with your conditions'. A green arrow points to the left of the checkbox with the text 'Tick this box'.

Below the form, there is a link 'Already registered? Login' and a large green 'Register' button. To the right of the form, there is a promotional text: 'Make agricultural supply chains transparent and fair with INATrace'.

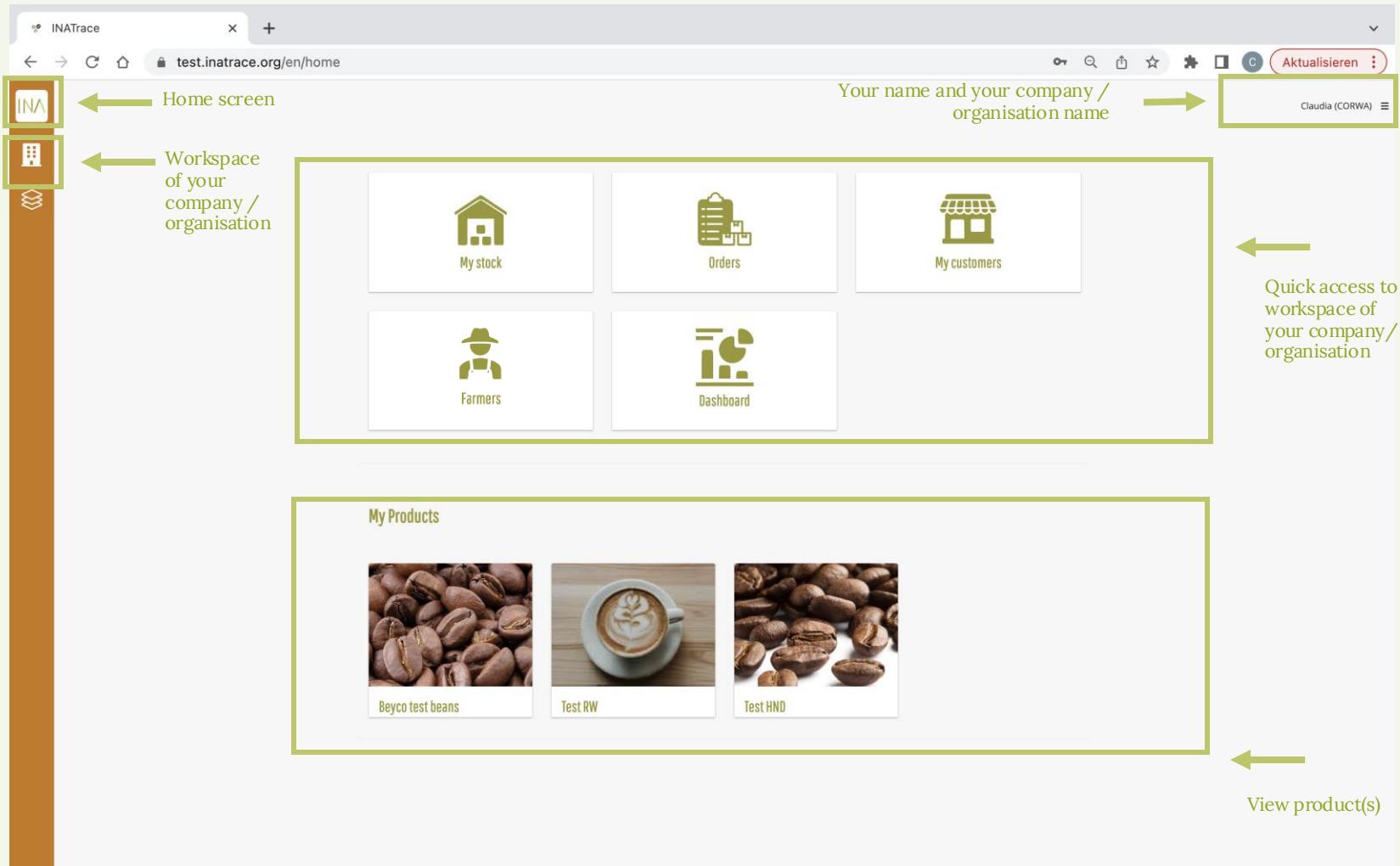
## 1.2 Access to the system

Once your account has been verified and activated, you can click on “Login” on <https://inatrace.org/> and input your email and password to enter the system.



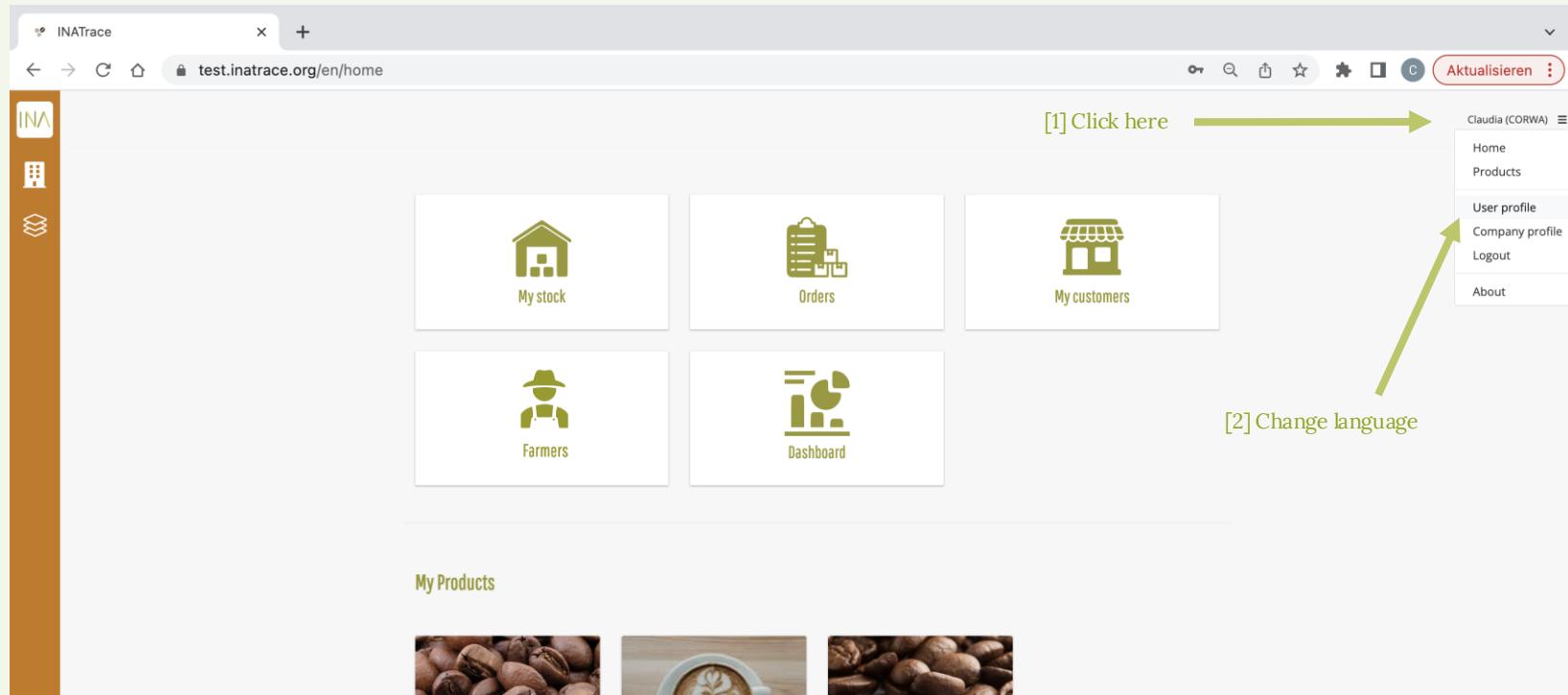
## 1.3 Overview of the user interface

Once you have successfully logged in into the system, the first page you see is the homepage (see below). On the same page, there are different tiles and icons that help you perform various tasks in the system.



## 1.4 Language settings (English, Kinyarwanda, Spanish and German)

To change the system language, click on the menu icon in the top left corner, then click on user profile.



On the screen that appears, locate, and select the language of your choice under user language then click on save button at the bottom of the page to validate change of language.

The screenshot shows the 'Edit My profile' page of the INATrace application. On the left, a vertical sidebar features icons for INA, a building, a stack of documents, and a gear. The main content area has a header 'Edit My profile' and a 'Basic information' section containing fields for First name\* (Claudia), Last name\* (Test), and Username (redacted). Below this is a 'Reset password' button. To the right is a 'User language' section with a 'Selected' box containing 'EN' (with the United Kingdom flag) and an 'Available' box containing 'DE' (Germany), 'RW' (Russia), and 'ES' (Spain). A green box highlights the 'Available' section, and a green arrow points from the text '[3] Select your language.' to it. At the bottom right are 'Go back' and 'Save' buttons, with a green arrow pointing from the text '[4] Click on save.' to the 'Save' button.

INATrace

test.inatrace.org/en/user-profile?returnUrl=%2Fhome

Claudia (Magic Mountain Producers) ≡

Edit My profile

Basic information

First name\*  
Claudia

Last name\*  
Test

Username  
[REDACTED]

Reset password

My companies

Montaña Mágica Productores  
Magic Mountain Producers

User language

Selected  
EN

Available  
DE RW ES

[3] Select your language.

Go back Save

[4] Click on save.

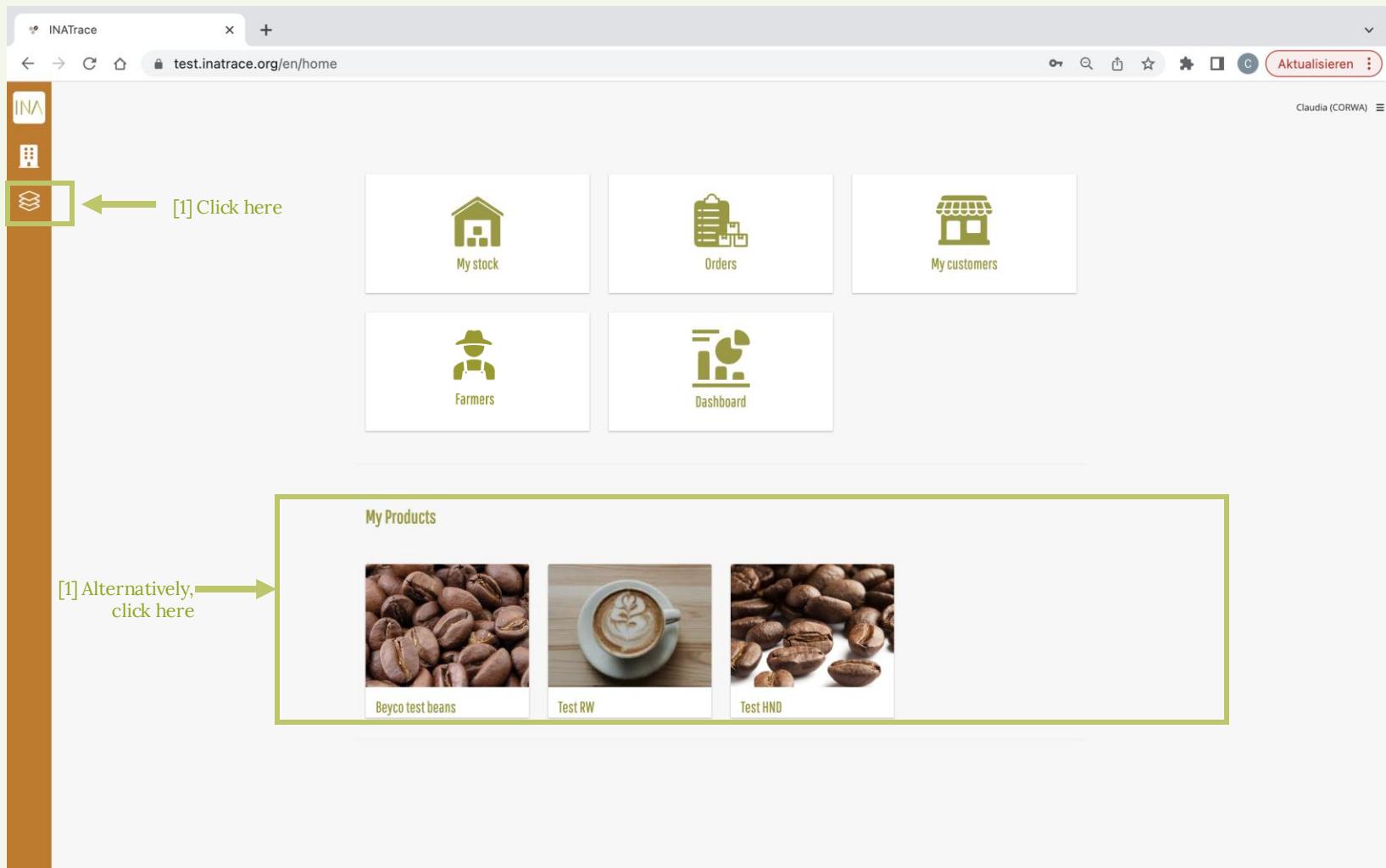
## Chapter 2.

# Product settings

In this part of the system, you are able to view general product settings, stakeholders of your supply chain and final products (=end-customer products).

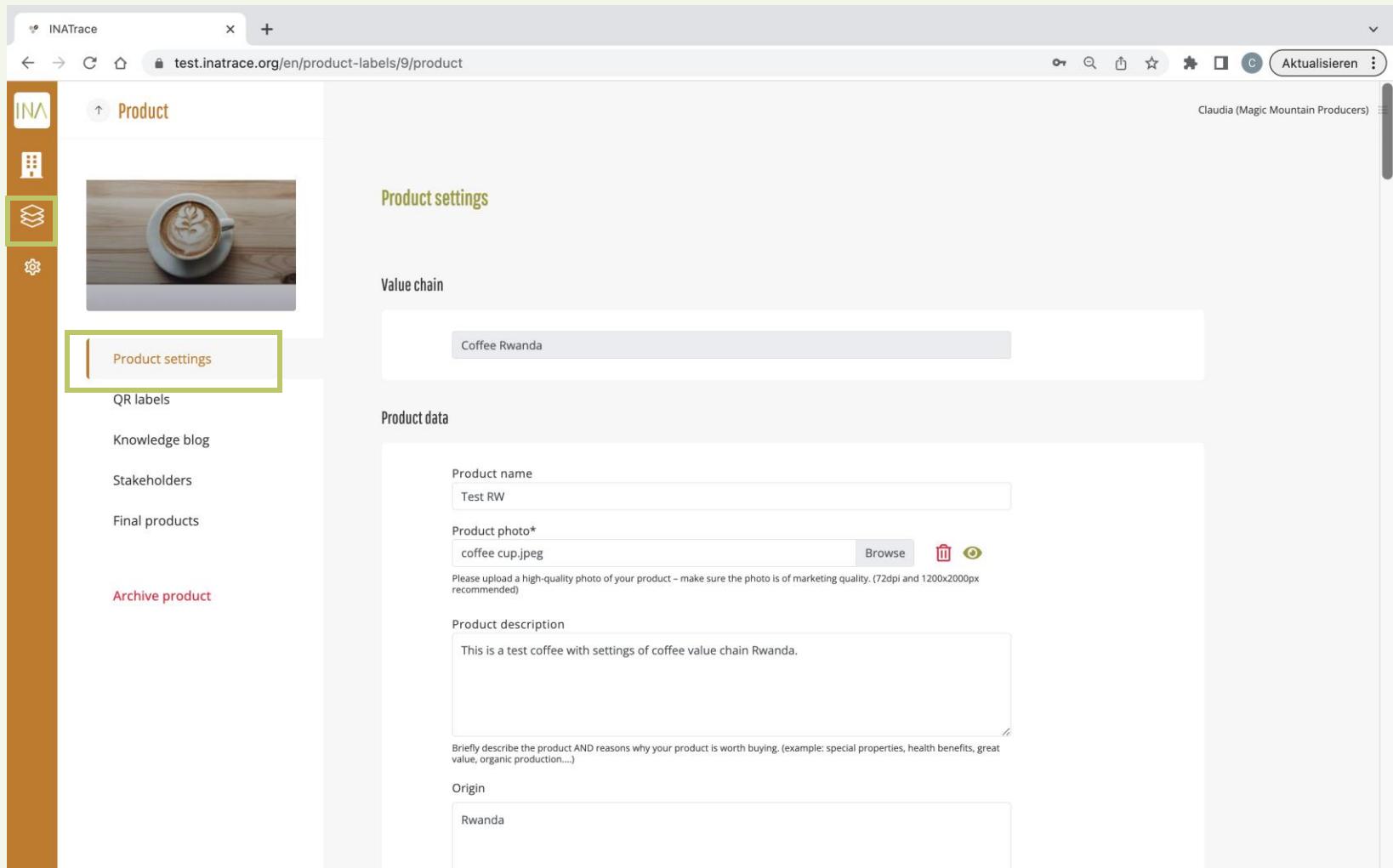
NOTE: In case you are the product owner (e.g. brand owner), you will be able to modify these parts including the design of the B2C page behind the QR Code scan in case you use QR codes on your products.

In order to access the product settings, follow the steps shown below.



## 2.1 General product settings

Here, you can edit the general product settings in case you are the product admin. Note, that these are the master settings for your product. Changes here do not affect already existing QR Code labels. In case you are not the product admin, data input fields will appear greyed out.



Product settings

Value chain

Coffee Rwanda

Product data

Product name: Test RW

Product photo\*: coffee cup.jpeg

Please upload a high-quality photo of your product – make sure the photo is of marketing quality. (72dpi and 1200x2000px recommended)

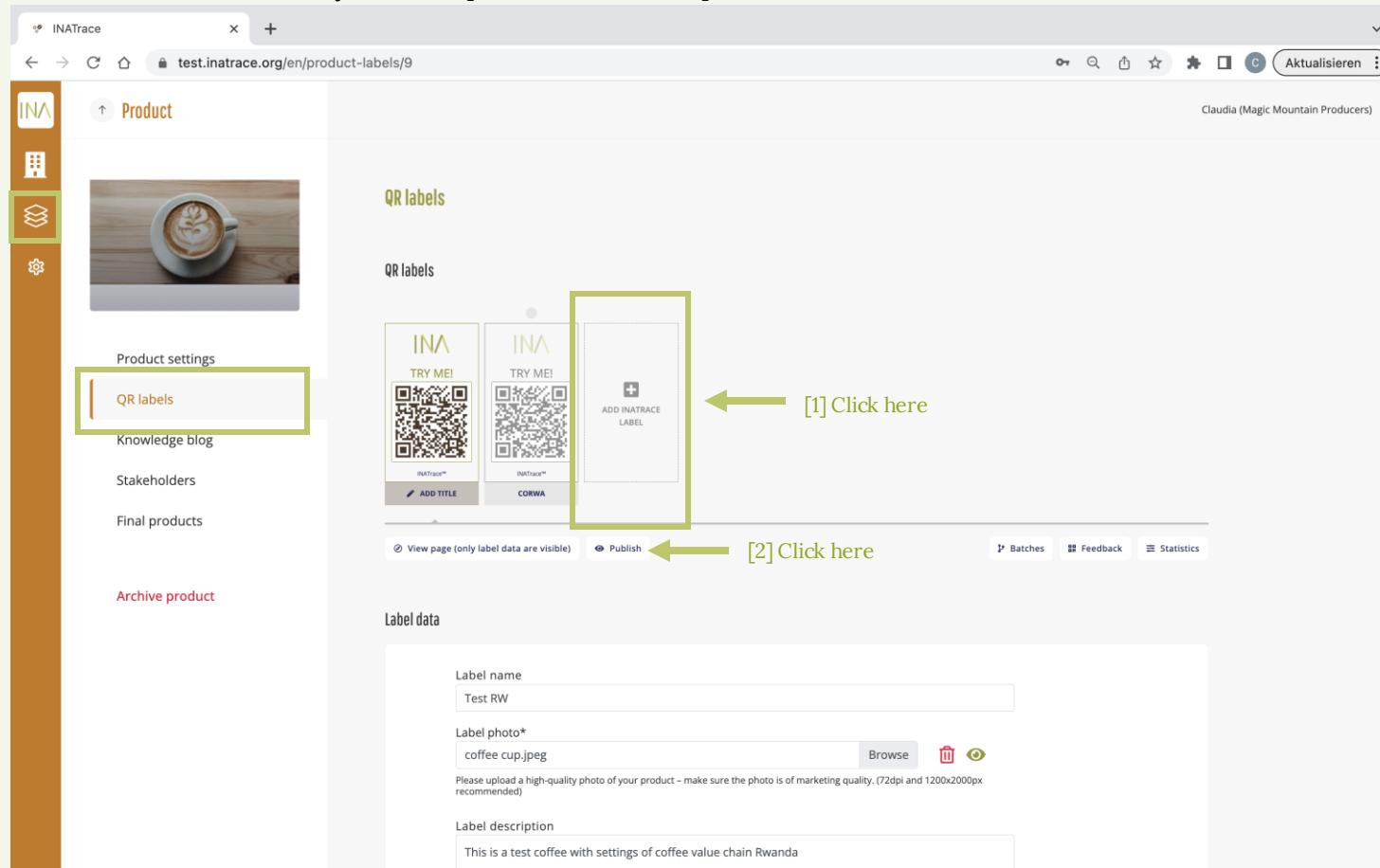
Product description: This is a test coffee with settings of coffee value chain Rwanda.

Briefly describe the product AND reasons why your product is worth buying. (example: special properties, health benefits, great value, organic production....)

Origin: Rwanda

## 2.2 QR Label settings

In the QR Labels section, the product admin can add a QR Label by clicking “Add INATrace Label”. You will be asked to add a title and select your end-customer’s language for the B2C page. You need to “Publish” the label in order to activate it. NOTE: The QR Label will be pre-filled with the master settings from the general “product settings” submenu. You can adjust the information for each QR Label here separately (e.g. individual designs or languages for different target groups). IMPORTANT: The QR Code shown here is NOT the QR code to be printed on your product packages, since it does not contain batch-specific information but is only the template with static product information.



The screenshot shows the INATrace product settings interface. On the left, a sidebar menu includes 'Product settings' (selected), 'QR labels' (highlighted with a green box), 'Knowledge blog', 'Stakeholders', 'Final products', and 'Archive product'. The main content area is titled 'QR labels' and shows two QR code templates: 'INA TRY ME!' and 'INA TRY ME! CORWA'. A third template, 'ADD INATRACE LABEL', is highlighted with a green box and a callout [1] 'Click here'. Below these are two radio buttons: 'View page (only label data are visible)' and 'Publish'. A callout [2] 'Click here' points to the 'Publish' button. At the bottom, a 'Label data' section contains fields for 'Label name' (Test RW), 'Label photo\*' (coffee.cup.jpeg), and 'Label description' (This is a test coffee with settings of coffee value chain Rwanda). Navigation links at the bottom include 'Batches', 'Feedback', and 'Statistics'.

## 2.3 Stakeholders

In the stakeholders section, you can see all stakeholders of your value.

The screenshot shows the 'Stakeholders' section of the INATRACE 2.0 platform. On the left, a vertical orange sidebar lists navigation options: INA (selected), Product, Value chain, Stakeholders (highlighted with a green box), Final products, Knowledge blog, QR labels, Product settings, and Archive product. The main content area is titled 'Value chain' and displays four sections: 'Buyers', 'Importers', 'Exporters', and 'Producers'. Each section contains a card for a specific stakeholder, with a ' + Add [stakeholder type]' button to the right of each card. The 'Buyers' section shows a card for 'CORWA'. The 'Importers' section shows a card for 'Export Pros'. The 'Exporters' section shows a card for 'Magic Mountain Producers'. The 'Producers' section shows a card for 'Magic Mountain Producers'.

Product

Value chain

Buyers

+ Add buyer

CORWA

Importers

+ Add importer

Export Pros

Exporters

+ Add exporter

Producers

+ Add producer

Magic Mountain Producers

Stakeholders

Final products

Knowledge blog

QR labels

Product settings

Archive product

In the lower part of the stakeholders section, you see who are the product admins for the selected product. A product can have one or several product admins. Below, you can upload the data sharing agreement for your value chain which is signed by all stakeholders.

The screenshot shows the INATrace product stakeholders page. The left sidebar has a 'Stakeholders' section highlighted with a green box. The main content area shows 'Product admins' for the product 'Magic Mountain Producers'. Below this is a 'Data sharing agreements' section with an 'Add new' button. A green box highlights the 'Add new' button, and a green arrow points to it with the text 'Upload data sharing agreements here'. A green arrow also points to the 'Save' button at the bottom right of the 'Data sharing agreements' section with the text 'Save'.

INATrace

Product

Value chain

Processors

+ Add processor

Traders

+ Add trader

Product admins

+ Add product admin

Magic Mountain Producers

CORWA

Export Pros

Stakeholders

Product settings

QR labels

Knowledge blog

Final products

Archive product

Data sharing agreements

Add new

Add new

Back

Save

Upload data sharing agreements here

Save

## 2.3 Final products

As a product admin, you can add your final products in this part. Final products are end-customer products. In case your company does not manage those, this section is not relevant for you.

Final products

List of final products  
Showing 1/1

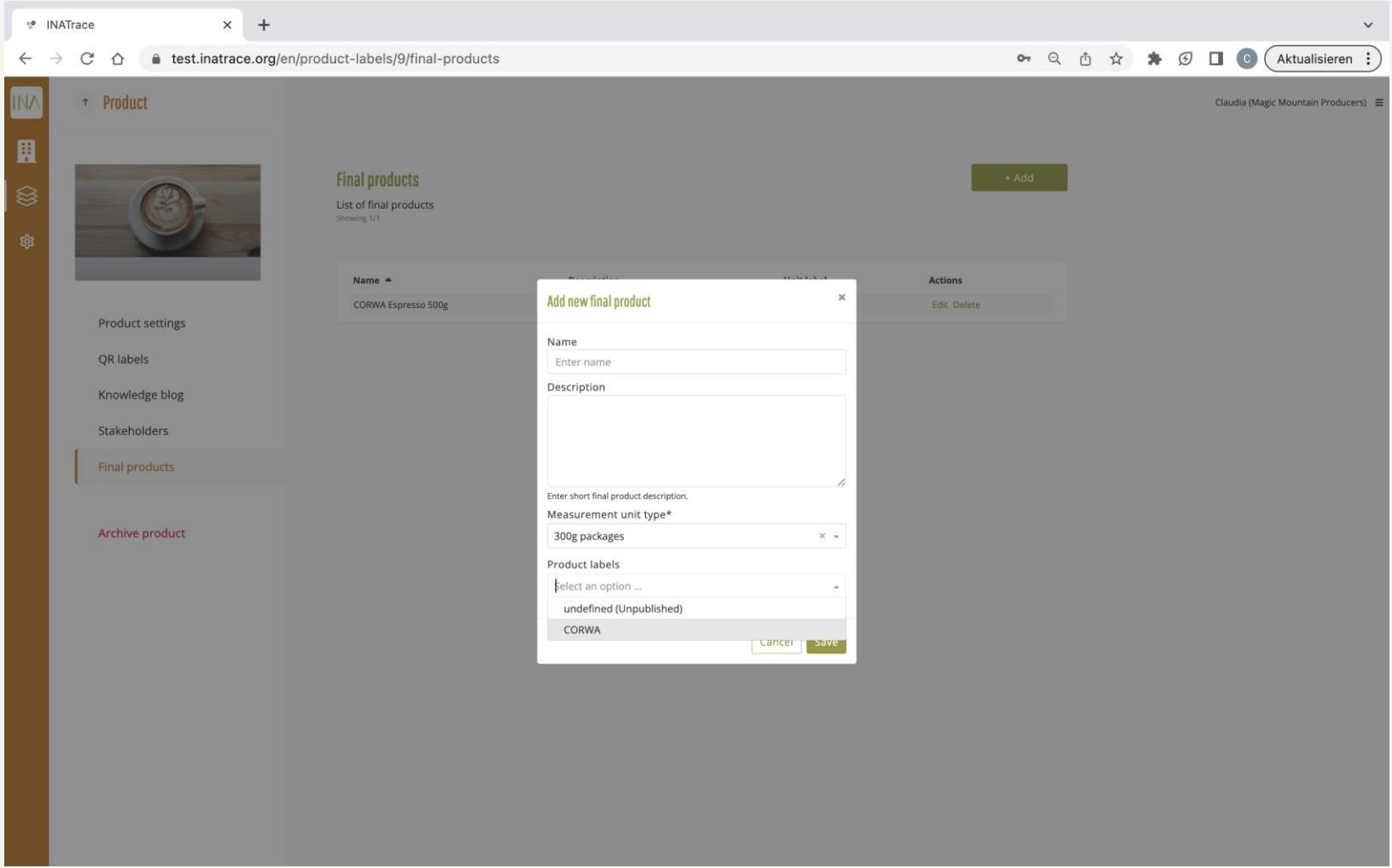
Name	Description	Unit label	Actions
CORWA Espresso 500g	CORWA Espresso 500g	500g packages	<a href="#">Edit</a> <a href="#">Delete</a>

+ Add

Click here to add a new final product

Click here to edit or delete a final product.  
NOTE: Do not delete a final product in case any processes have been recorded in the system for this final product or in case QR Codes you are using are linked to this final product

When adding a new final product, you will be asked to enter a name and description, select a measuring unit type and select a product label. The product label is your previously added QR label. Make sure to publish the QR label before adding it to a final product. In case you are not using QR codes on your products, you do not need to add a product label.



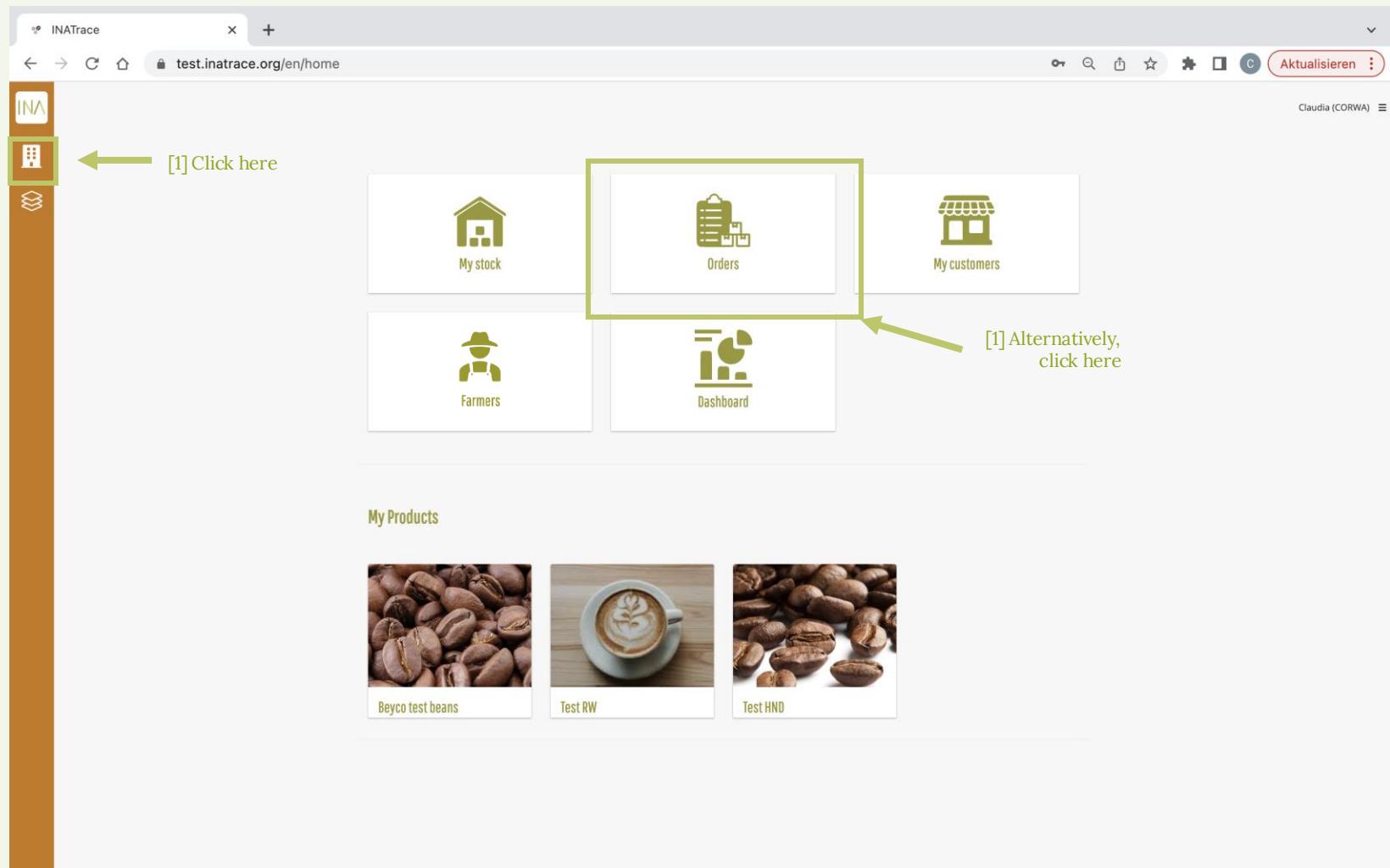
The screenshot shows the INATrace software interface for managing final products. The left sidebar has a brown header with the INA logo and navigation links: Product, Product settings, QR labels, Knowledge blog, Stakeholders, Final products (which is selected and highlighted in orange), and Archive product. The main content area has a header 'Final products' with a sub-header 'List of final products Showing 1/1'. A thumbnail image of a coffee cup with a latte art design is displayed. On the right, there is a green 'Add' button. A modal dialog box is open in the center, titled 'Add new final product'. It contains fields for 'Name' (with 'CORWA Espresso 500g' as a placeholder), 'Description' (empty), 'Enter short final product description.' (empty), 'Measurement unit type\*' (with '300g packages' selected), and a 'Product labels' dropdown menu. The dropdown shows 'Select an option ...' and 'undefined (Unpublished)' (highlighted in grey). At the bottom of the dialog are 'Cancel' and 'Save' buttons. The top right of the dialog shows 'Actions' with 'Edit' and 'Delete' options.

## Chapter 3. Orders

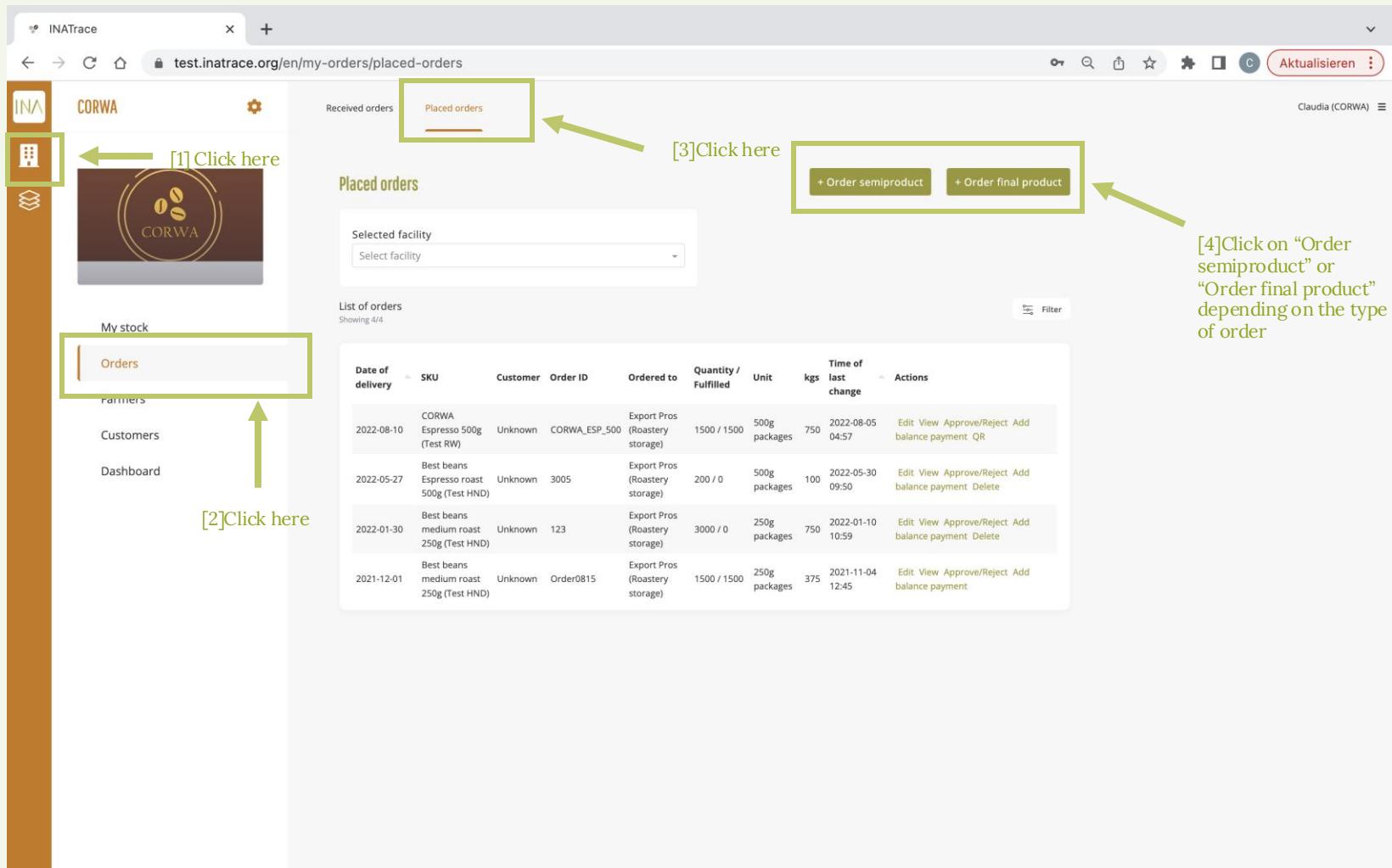
This module allows company users to place orders to their suppliers and fulfill orders from their buyers.

### 3.1 Place an order to your supplier

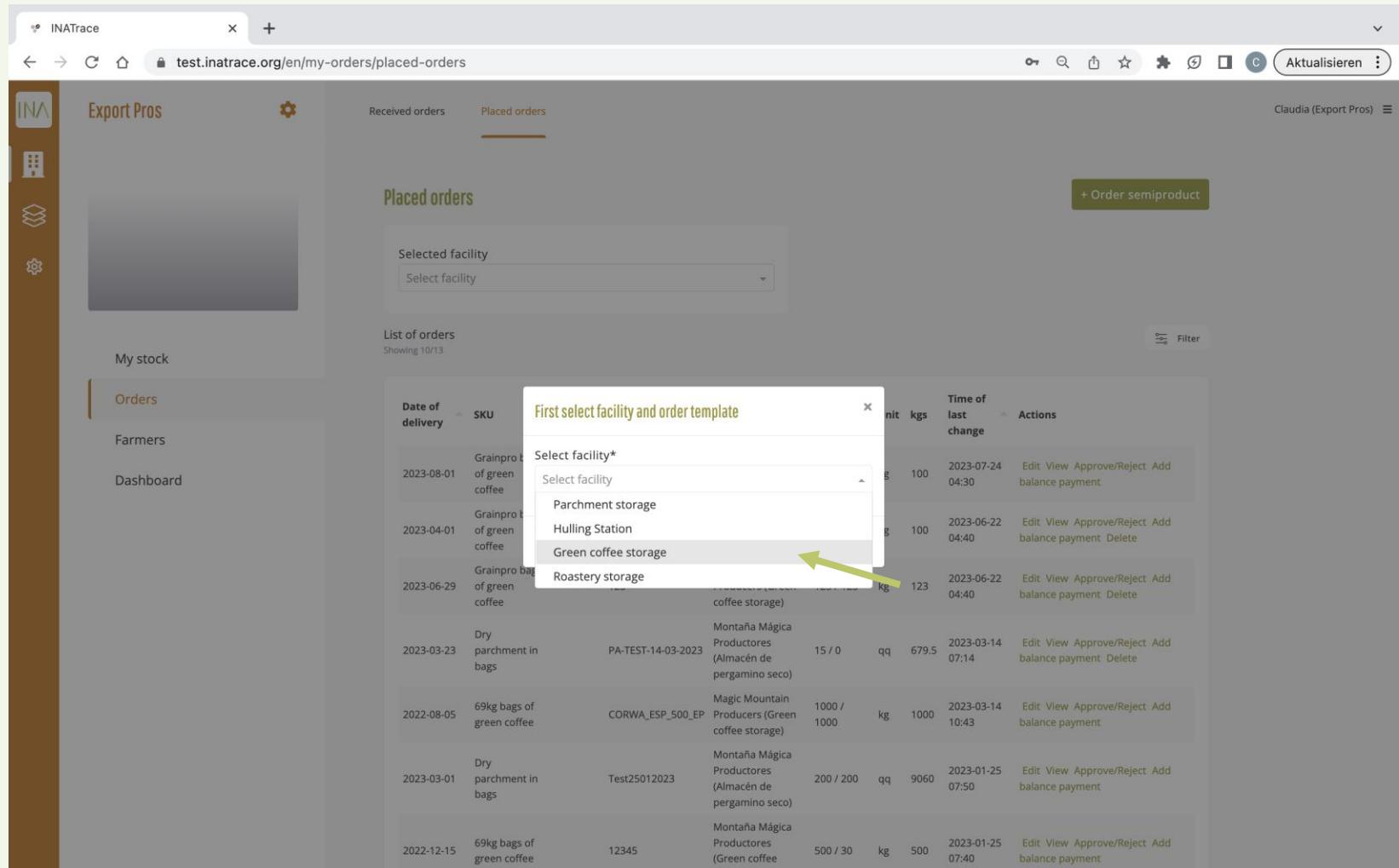
To access the orders section, click on the “Company” icon as shown on the screenshot below and select “Orders” from the submenu. You can also go directly to “Orders” tile as shown below.



In order to place an order to your supplier, follow the steps below.



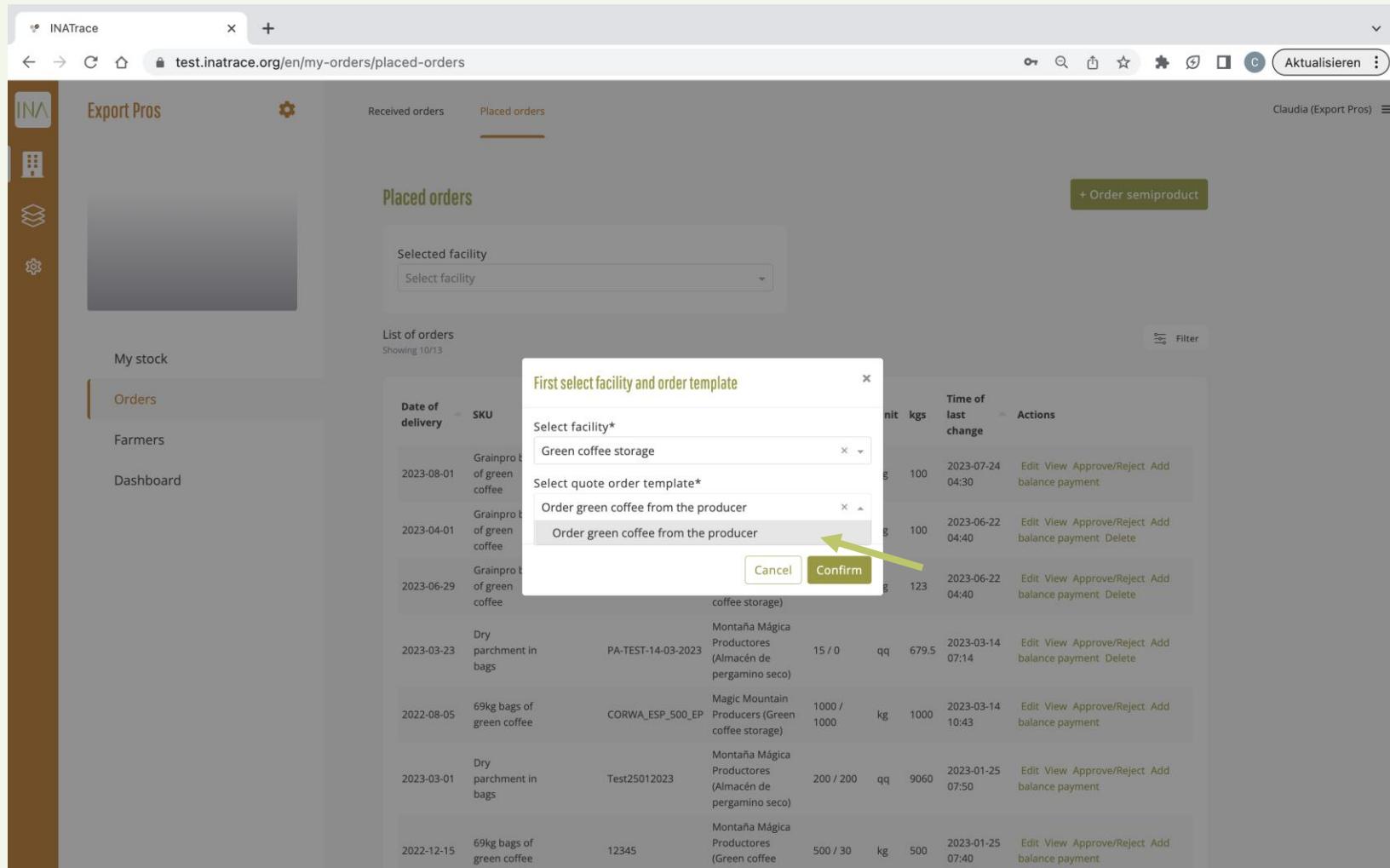
For a **semiproduct order**, select your company facility where you want to receive your ordered items.



The screenshot shows the INATrace web interface for managing orders. The user is in the 'Placed orders' section, indicated by the orange bar at the top. A modal window is open, titled 'First select facility and order template'. The modal contains a dropdown menu labeled 'Select facility' with the following options: 'Parchment storage', 'Hulling Station', 'Green coffee storage', and 'Roastery storage'. A yellow arrow points from the text 'Select facility' to the 'Roastery storage' option. The background table lists various orders with columns for Date of delivery, SKU, Time of last change, and Actions. The 'Actions' column includes links for Edit, View, Approve/Reject, Add balance payment, and Delete.

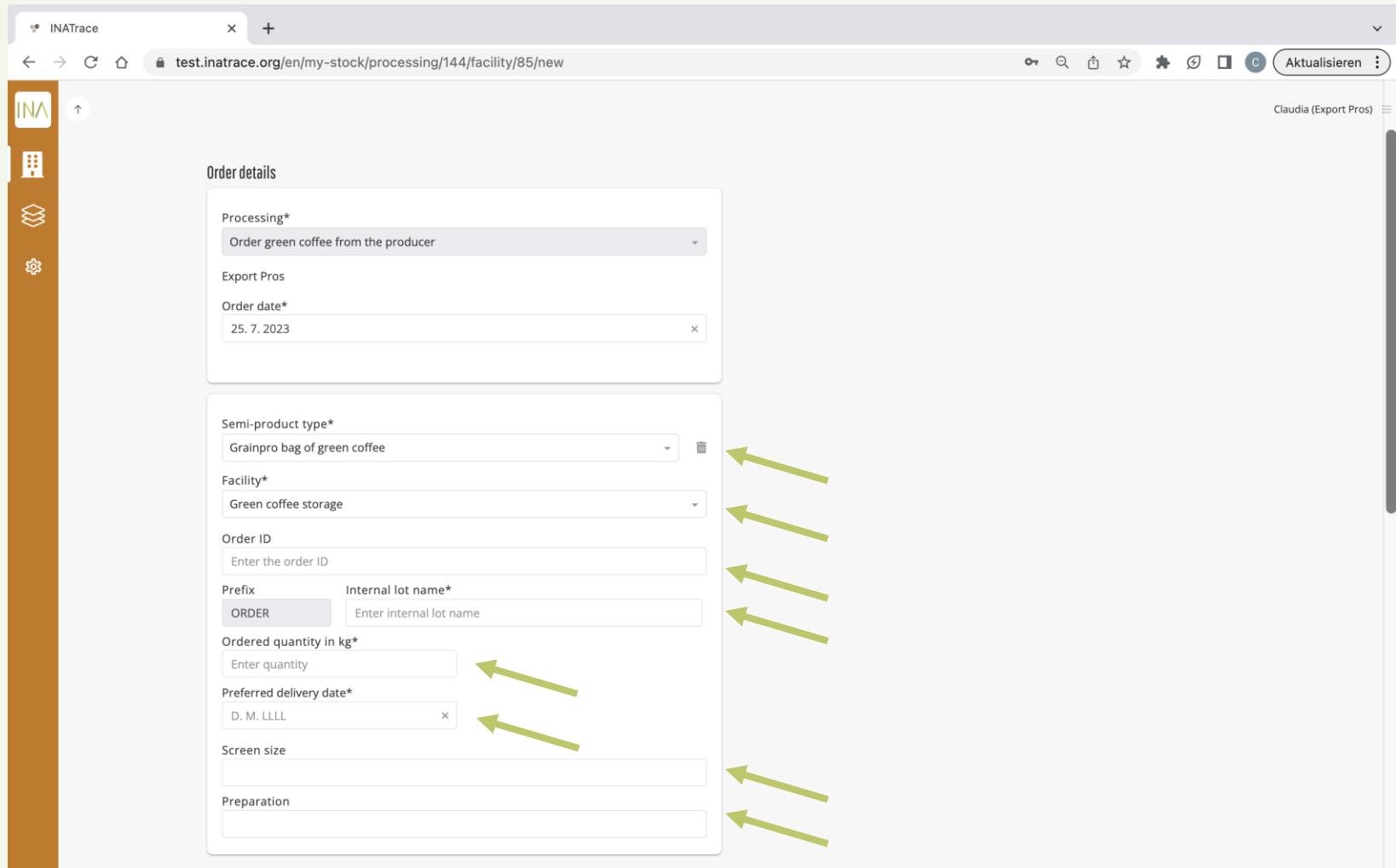
Date of delivery	SKU	Time of last change	Actions
2023-08-01	Grainpro of green coffee	2023-07-24 04:30	Edit View Approve/Reject Add balance payment
2023-04-01	Grainpro of green coffee	2023-06-22 04:40	Edit View Approve/Reject Add balance payment Delete
2023-06-29	Grainpro bag of green coffee	2023-06-22 04:40	Edit View Approve/Reject Add balance payment Delete
2023-03-23	Dry parchment in bags	2023-03-14 07:14	Edit View Approve/Reject Add balance payment Delete
2022-08-05	69kg bags of green coffee	2023-03-14 10:43	Edit View Approve/Reject Add balance payment
2023-03-01	Dry parchment in bags	2023-01-25 07:50	Edit View Approve/Reject Add balance payment
2022-12-15	69kg bags of green coffee	2023-01-25 07:40	Edit View Approve/Reject Add balance payment

Select the type of order you want to place. Note that if you do not find the right order template here, you have to add it in your company configuration under processing actions with type “order”.



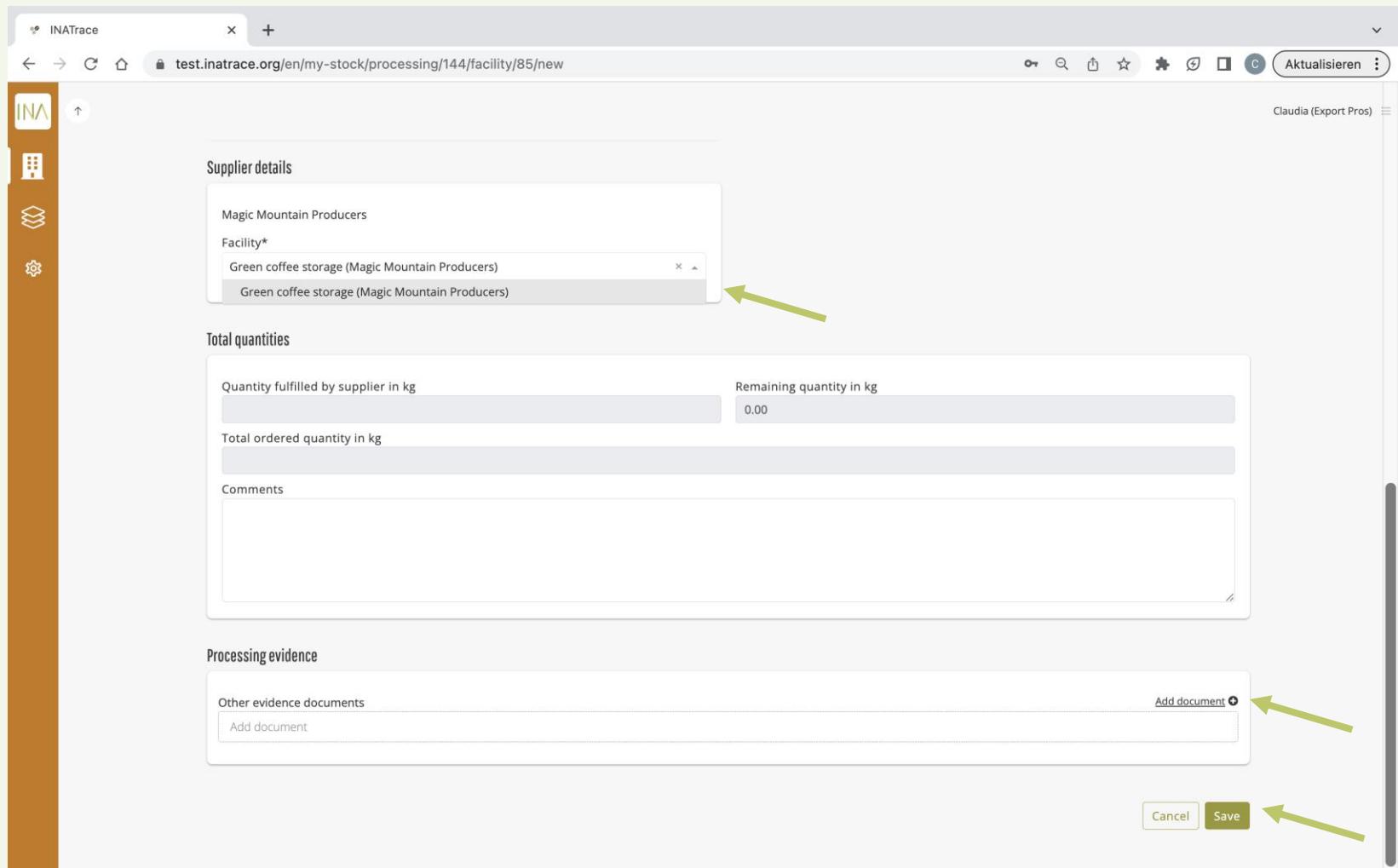
The screenshot shows the INATrace software interface for managing orders. The main window displays a list of 'Placed orders' with columns for Date of delivery, SKU, Description, Unit, kgs, Time of last change, and Actions. A modal dialog box is overlaid on the screen, prompting the user to 'First select facility and order template'. The dialog contains two dropdown menus: 'Select facility\*' (set to 'Green coffee storage') and 'Select quote order template\*' (set to 'Order green coffee from the producer'). At the bottom of the dialog are 'Cancel' and 'Confirm' buttons, with a green arrow pointing to the 'Confirm' button. The background list shows several order entries, such as 'Grainpro' and 'Dry parchment in bags'.

Enter all order details.



The screenshot shows the 'Order details' section of the INATRACE 2.0 application. The page has a header with the INATRACE logo and a navigation bar. On the left, there is a vertical sidebar with icons for 'INA', 'Stock', 'Facilities', and 'Settings'. The main content area is titled 'Order details' and contains several input fields. Most fields have a red asterisk (\*) indicating they are required. Green arrows point to the following fields: 'Processing\*', 'Semi-product type\*', 'Facility\*', 'Order ID', 'Prefix', 'Internal lot name\*', 'Ordered quantity in kg\*', 'Preferred delivery date\*', 'Screen size', and 'Preparation'. The 'Processing\*' field is currently set to 'Order green coffee from the producer'. The 'Order date\*' field is set to '25. 7. 2023'. The 'Semi-product type\*' field is set to 'Grainpro bag of green coffee'. The 'Facility\*' field is set to 'Green coffee storage'. The 'Order ID' field is empty. The 'Prefix' field is set to 'ORDER' and the 'Internal lot name\*' field is empty. The 'Ordered quantity in kg\*' field is empty. The 'Preferred delivery date\*' field is empty. The 'Screen size' field is empty. The 'Preparation' field is empty.

Select your supplier's facility you are ordering from. Add comments to further specify your order if needed or add documents before saving the order.



The screenshot shows the INATrace software interface for managing supplier orders. The main window is titled 'Supplier details' and displays the following fields:

- Facility\***: A dropdown menu showing 'Green coffee storage (Magic Mountain Producers)' and 'Green coffee storage (Magic Mountain Producers)' (selected).
- Total quantities**:
  - Quantity fulfilled by supplier in kg: 0.00
  - Remaining quantity in kg: 0.00
  - Total ordered quantity in kg: 0.00
- Comments**: A text area for additional notes.

Below the 'Supplier details' section is a 'Processing evidence' section:

- Other evidence documents**: A list box with an 'Add document' button.

At the bottom right of the main window are the 'Cancel' and 'Save' buttons. Three green arrows point to these buttons and the 'Add document' button in the 'Processing evidence' section, indicating they are the primary actions to be taken.

After saving the order, it will appear in your List of orders with the quantity you ordered. The fulfilled quantity will show “0” until your supplier added a batch from their stock to your order.

INATrace

Export Pros

Received orders

Placed orders

Claudia (Export Pros)

My stock

Orders

Farmers

Dashboard

Placed orders

+ Order semiproduct

Selected facility

Select facility

List of orders

Showing 10/14

Filter

Date of delivery	SKU	Customer	Order ID	Ordered to	Quantity / Fulfilled	Unit	kgs	Time of last change	Actions
2023-08-01	Grainpro bag of green coffee		Test25072023	Magic Mountain Producers (Green coffee storage)	100 / 0	kg	100	2023-07-25 10:56	<a href="#">Edit</a> <a href="#">View</a> <a href="#">Approve/Reject</a> <a href="#">Add balance payment</a> <a href="#">Delete</a>
2023-08-01	Grainpro bag of green coffee		Test0815	Magic Mountain Producers (Green coffee storage)	100 / 100	kg	100	2023-07-24 04:30	<a href="#">Edit</a> <a href="#">View</a> <a href="#">Approve/Reject</a> <a href="#">Add balance payment</a>
2023-04-01	Grainpro bag of green coffee		Test150323	Magic Mountain Producers (Green coffee storage)	100 / 100	kg	100	2023-06-22 04:40	<a href="#">Edit</a> <a href="#">View</a> <a href="#">Approve/Reject</a> <a href="#">Add balance payment</a> <a href="#">Delete</a>
2023-06-29	Grainpro bag of green coffee	123		Magic Mountain Producers (Green coffee storage)	123 / 123	kg	123	2023-06-22 04:40	<a href="#">Edit</a> <a href="#">View</a> <a href="#">Approve/Reject</a> <a href="#">Add balance payment</a> <a href="#">Delete</a>
2023-03-23	Dry parchment in bags		PA-TEST-14-03-2023	Montaña Mágica Productores (Almacén de pergamino seco)	15 / 0	qq	679.5	2023-03-14 07:14	<a href="#">Edit</a> <a href="#">View</a> <a href="#">Approve/Reject</a> <a href="#">Add balance payment</a> <a href="#">Delete</a>
2022-08-05	69kg bags of green coffee		CORWA_ESP_500_EP	Magic Mountain Producers (Green coffee storage)	1000 / 1000	kg	1000	2023-03-14 10:43	<a href="#">Edit</a> <a href="#">View</a> <a href="#">Approve/Reject</a> <a href="#">Add balance payment</a>
2023-03-01	Dry parchment in bags		Test25012023	Montaña Mágica Productores (Almacén de pergamino seco)	200 / 200	qq	9060	2023-01-25 07:50	<a href="#">Edit</a> <a href="#">View</a> <a href="#">Approve/Reject</a> <a href="#">Add balance payment</a>

For a **final product order**, specify the Order ID, your customer, order ID, latest date of delivery and add details for the final product you order including your suppliers' facility you order from, the end-customer's currency and end-customer price. Click "continue" and add more final products to your order by clicking on "add order item" before saving. NOTE: In order to place a final product order, you need to have at least one customer in your "customer" section of the system beforehand. In case you order for a number of different customers, you can simply create a company called "various" or "unknown" in the customers section.

INATrace

test.inatrace.org/en/my-orders/customer-order/add

Order ID\*  
TEST123

Customer\*  
Unknown

Order to\*  
Roasted coffee storage

Women's only

Organic only

Latest date of delivery\*  
3. 7. 2023

List of order items

Add order item

Final product\*  
CORWA Espresso 500g (Order 500g Espresso)

Order from  
Select facility

Quantity in 500g packages\*  
Enter quantity

Internal lot name  
-

Currency for end-customer\*  
EUR

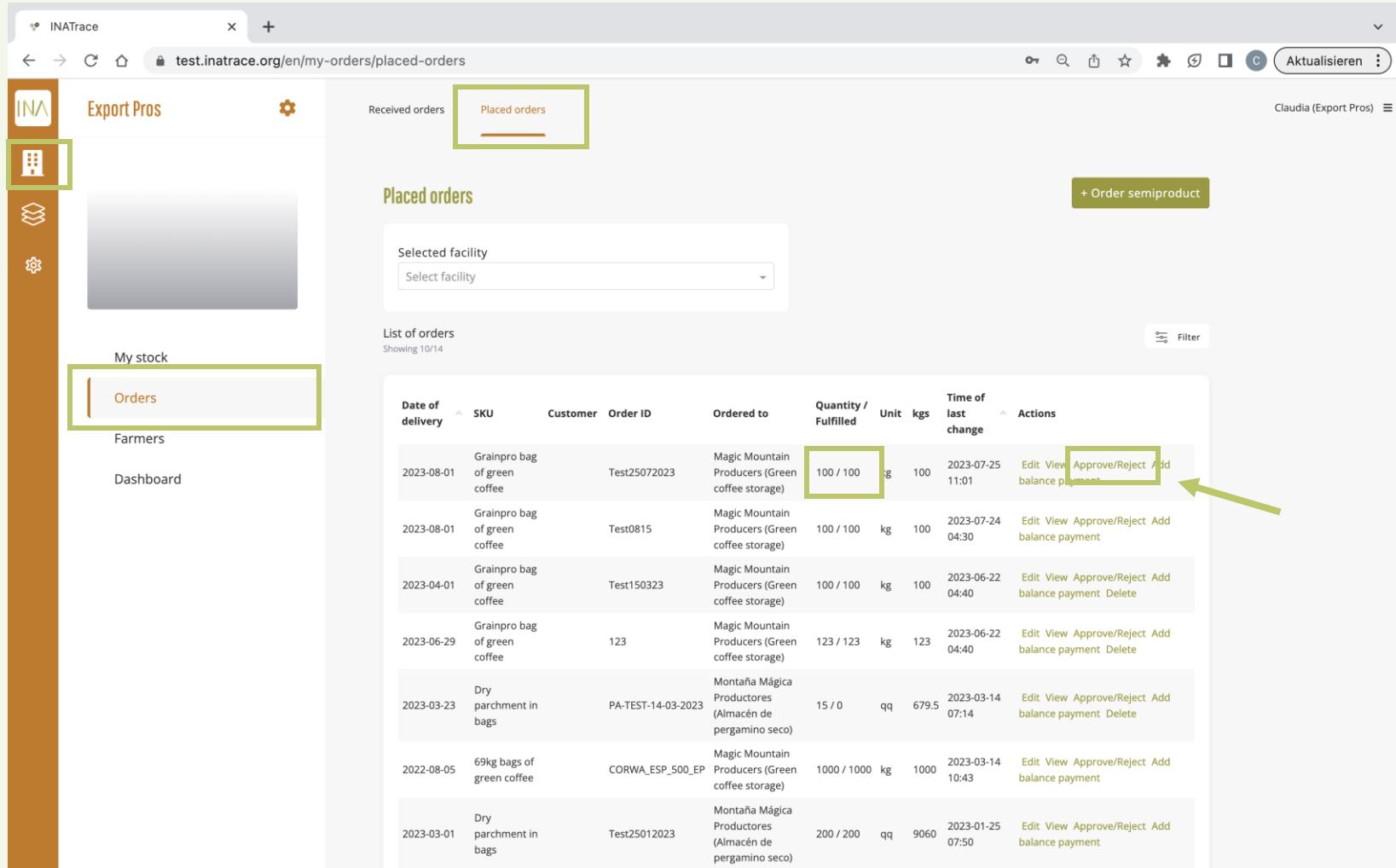
Gross price per item at end customer (EUR)\*  
Enter price in EUR

Cancel Confirm

Cancel Save

## 3.2 Approve your supplier's order fulfillment

Once your supplier has allocated the required quantity from their stock to your order, you will see the fulfilled quantity equaling the ordered quantity. Click on “Approve/Reject” to review the batches allocated to your order.



The screenshot shows the INATrace web interface for managing orders. The left sidebar has a brown background with icons for 'My stock' (highlighted with a green box), 'Orders' (highlighted with a green box), 'Farmers', and 'Dashboard'. The main content area has a white background. At the top, there are tabs for 'Received orders' and 'Placed orders' (highlighted with a green box). Below this is a section for 'Placed orders' with a 'Selected facility' dropdown. The main table lists orders with columns for Date of delivery, SKU, Customer, Order ID, Ordered to, Quantity / Fulfilled, Unit, kgs, Time of last change, and Actions. The 'Actions' column for each row contains 'Edit', 'View', 'Approve/Reject', 'Add balance payment', and 'Delete'. A green box highlights the 'Approve/Reject' button for the first order, and a green arrow points to it from the bottom right.

Date of delivery	SKU	Customer	Order ID	Ordered to	Quantity / Fulfilled	Unit	kgs	Time of last change	Actions
2023-08-01	Grainpro bag of green coffee		Test25072023	Magic Mountain Producers (Green coffee storage)	100 / 100	kg	100	2023-07-25 11:01	Edit View Approve/Reject Add balance payment
2023-08-01	Grainpro bag of green coffee		Test0815	Magic Mountain Producers (Green coffee storage)	100 / 100	kg	100	2023-07-24 04:30	Edit View Approve/Reject Add balance payment
2023-04-01	Grainpro bag of green coffee		Test150323	Magic Mountain Producers (Green coffee storage)	100 / 100	kg	100	2023-06-22 04:40	Edit View Approve/Reject Add balance payment Delete
2023-06-29	Grainpro bag of green coffee	123		Magic Mountain Producers (Green coffee storage)	123 / 123	kg	123	2023-06-22 04:40	Edit View Approve/Reject Add balance payment Delete
2023-03-23	Dry parchment in bags		PA-TEST-14-03-2023	Montaña Mágica Productores (Almacén de pergamino seco)	15 / 0	qq	679.5	2023-03-14 07:14	Edit View Approve/Reject Add balance payment Delete
2022-08-05	69kg bags of green coffee		CORWA_ESP_500_EP	Magic Mountain Producers (Green coffee storage)	1000 / 1000	kg	1000	2023-03-14 10:43	Edit View Approve/Reject Add balance payment
2023-03-01	Dry parchment in bags		Test25012023	Montaña Mágica Productores (Almacén de pergamino seco)	200 / 200	qq	9060	2023-01-25 07:50	Edit View Approve/Reject Add balance payment

If the allocated batches suffice your requirements, click “confirm”. To reject one or several batches, untick the corresponding one(s). NOTE: Approving orders is a mandatory step to make the batches available in your company's stock and to be able to start recording processes or to fulfill your buyer's orders.

The screenshot shows the INATrace software interface for managing placed orders. The main screen displays a list of orders with columns for Date of delivery, SKU, Unit, kgs, Time of last change, and Actions. A modal dialog titled "Approve / reject transactions" is overlaid on the list, showing a subset of the data with green checkmarks in the Actions column. A yellow arrow points to the "Confirm" button in the bottom right corner of the modal.

Date of delivery	SKU	Unit	kgs	Time of last change	Actions
2023-08-01	12345/2 60 kg	kg	100	2023-07-25 11:01	Edit View Approve/Reject Add balance payment
2023-08-01	12345/1 35 kg	kg	100	2023-07-24 04:30	Edit View Approve/Reject Add balance payment
2023-04-01	15112021/3 5 kg	kg	100	2023-06-22 04:40	Edit View Approve/Reject Add balance payment Delete
2023-06-29	Grainpro bag of green coffee	kg	123 / 123	2023-06-22 04:40	Edit View Approve/Reject Add balance payment Delete
2023-03-23	Dry parchment in bags	kg	15 / 0	2023-03-14 07:14	Edit View Approve/Reject Add balance payment Delete
2022-08-05	69kg bags of green coffee	kg	1000 / 1000	2023-03-14 10:43	Edit View Approve/Reject Add balance payment
2023-03-01	Dry parchment in bags	kg	200 / 200	2023-01-25 07:50	Edit View Approve/Reject Add balance payment

You can also review the order's history through clicking the “view” button which is a shortcut to your company's stock with the respective batch history.

INATrace

test.inatrace.org/en/my-orders/placed-orders

Export Pros

Received orders

Placed orders

Claudia (Export Pros)

My stock

Orders

Farmers

Dashboard

Placed orders

+ Order semiproduct

Selected facility

Select facility

List of orders

Showing 10/14

Filter

Date of delivery	SKU	Customer	Order ID	Ordered to	Quantity / Fulfilled	Unit	kgs	Time of last change	Actions
2023-08-01	Grainpro bag of green coffee		Test25072023	Magic Mountain Producers (Green coffee storage)	100 / 100	kg	100	2023-07-25 11:01	<a href="#">Edit</a> <a href="#">View</a> <a href="#">Approve/Reject</a> <a href="#">Add balance payment</a>
2023-08-01	Grainpro bag of green coffee		Test0815	Magic Mountain Producers (Green coffee storage)	100 / 100	kg	100	2023-07-24 04:30	<a href="#">Edit</a> <a href="#">View</a> <a href="#">Approve/Reject</a> <a href="#">Add balance payment</a>
2023-04-01	Grainpro bag of green coffee		Test150323	Magic Mountain Producers (Green coffee storage)	100 / 100	kg	100	2023-06-22 04:40	<a href="#">Edit</a> <a href="#">View</a> <a href="#">Approve/Reject</a> <a href="#">Add balance payment</a> <a href="#">Delete</a>
2023-06-29	Grainpro bag of green coffee	123		Magic Mountain Producers (Green coffee storage)	123 / 123	kg	123	2023-06-22 04:40	<a href="#">Edit</a> <a href="#">View</a> <a href="#">Approve/Reject</a> <a href="#">Add balance payment</a> <a href="#">Delete</a>
2023-03-23	Dry parchment in bags		PA-TEST-14-03-2023	Montaña Mágica Productores (Almacén de pergamino seco)	15 / 0	qq	679.5	2023-03-14 07:14	<a href="#">Edit</a> <a href="#">View</a> <a href="#">Approve/Reject</a> <a href="#">Add balance payment</a> <a href="#">Delete</a>
2022-08-05	69kg bags of green coffee		CORWA_ESP_500_EP	Magic Mountain Producers (Green coffee storage)	1000 / 1000	kg	1000	2023-03-14 10:43	<a href="#">Edit</a> <a href="#">View</a> <a href="#">Approve/Reject</a> <a href="#">Add balance payment</a>
2023-03-01	Dry parchment in bags		Test25012023	Montaña Mágica Productores (Almacén de pergamino seco)	200 / 200	qq	9060	2023-01-25 07:50	<a href="#">Edit</a> <a href="#">View</a> <a href="#">Approve/Reject</a> <a href="#">Add balance payment</a>

By clicking on a specific line in the history, you will get more details about the respective transaction displayed in the upper right part of the interface named “processing information”.

**Order details**

**Basic information**

Internal lot name	Test25072023
Facility	Green coffee storage (Export Pros)
Semi-product	Grainpro bag of green coffee
Total	100 kg
Fulfilled	100 kg
Available quantity	100 kg
Created	2023-07-25 10:56
Last change	2023-07-25 11:08
Production date	2023-07-25
Comment	-

**Processing information**

Order type	QUO
Processing action	Order green coffee from the producer (Quote)
Inputs	
Grainpro bag of green coffee <ul style="list-style-type: none"> <li>60 kg</li> <li>35 kg</li> <li>5 kg</li> </ul>	
Outputs	





Legend: required in process - present, required in process - missing, additional document in process,  required on quote - present,  required on quote - missing,  one of required documents on quote in group G1 present,  all of required documents on quote in group G1 missing

**History**

- 2023-07-25 - Order green coffee from the producer
  - 2023-07-25 @ Green coffee storage : Test25072023 - 100 kg. (this order)
- 2023-07-25 - Transfer 60kg bags to green coffee storage
  - 2023-07-21 @ Green coffee storage - 12345/1 - 35 kg
  - 2023-07-21 @ Green coffee storage - 12345/2 - 60 kg
- 2023-07-21 - Hulling and sorting
  - 2023-07-21 @ Hulling Station : ORDER LOT 123testA1PS/1/1 - 60 kg
  - 2023-07-21 @ Hulling Station : ORDER LOT 123testA1PS/1/2 - 60 kg
  - 2023-07-21 @ Hulling Station : ORDER LOT 123testA1PS/1/3 - 60 kg
  - 2023-07-21 @ Hulling Station : ORDER LOT 123testA1PS/1/4 - 60 kg
  - 2023-07-21 @ Hulling Station : ORDER LOT 123testA1PS/1/5 - 60 kg
  - 2023-07-21 @ Hulling Station : ORDER LOT 123testA1PS/1/6 - 60 kg
  - 2023-07-21 @ Hulling Station : ORDER LOT 123testA1PS/1/7 - 60 kg
  - 2023-07-21 @ Hulling Station : ORDER LOT 123testA1PS/1/8 - 35 kg
- 2023-07-21 - Transfer parchment to hulling station
  - 2023-07-21 @ Hulling Station : LOT 123testA1PS/1 - 500 kg
- 2023-02-23 - Packing dried coffee and transfer to parchment storage
  - 2023-02-23 @ Parchment storage : 123testA1PS - 500 kg
  - 2023-02-23 @ Hulling Station : 123testA1HS - 500 kg
- 2023-02-23 - Wet-processing and moving to drying bed
  - 2023-02-23 @ Washing station 1 : 123testA1 - 1100 kg
  - 2023-02-23 @ Washing station 1 : 123testA2 - 300 kg
- 2023-02-23 - Weighing of coffee cherries
  - 2023-02-23 @ Washing station 1 : 123test - 2000 kg

INATRACE 2.0 USER GUIDE FOR BUYER COMPANIES | 33

## Chapter 4.

# Processing module

The processing module helps system users to record all activities related to semi-products processing from one stage to the next and transferring the semi-product from one facility to another.

## General Note on recording processing actions

Each supply chain is different, **each company's configuration and user interface in INATrace are individual**. This is especially true regarding the company's facilities and processing actions.

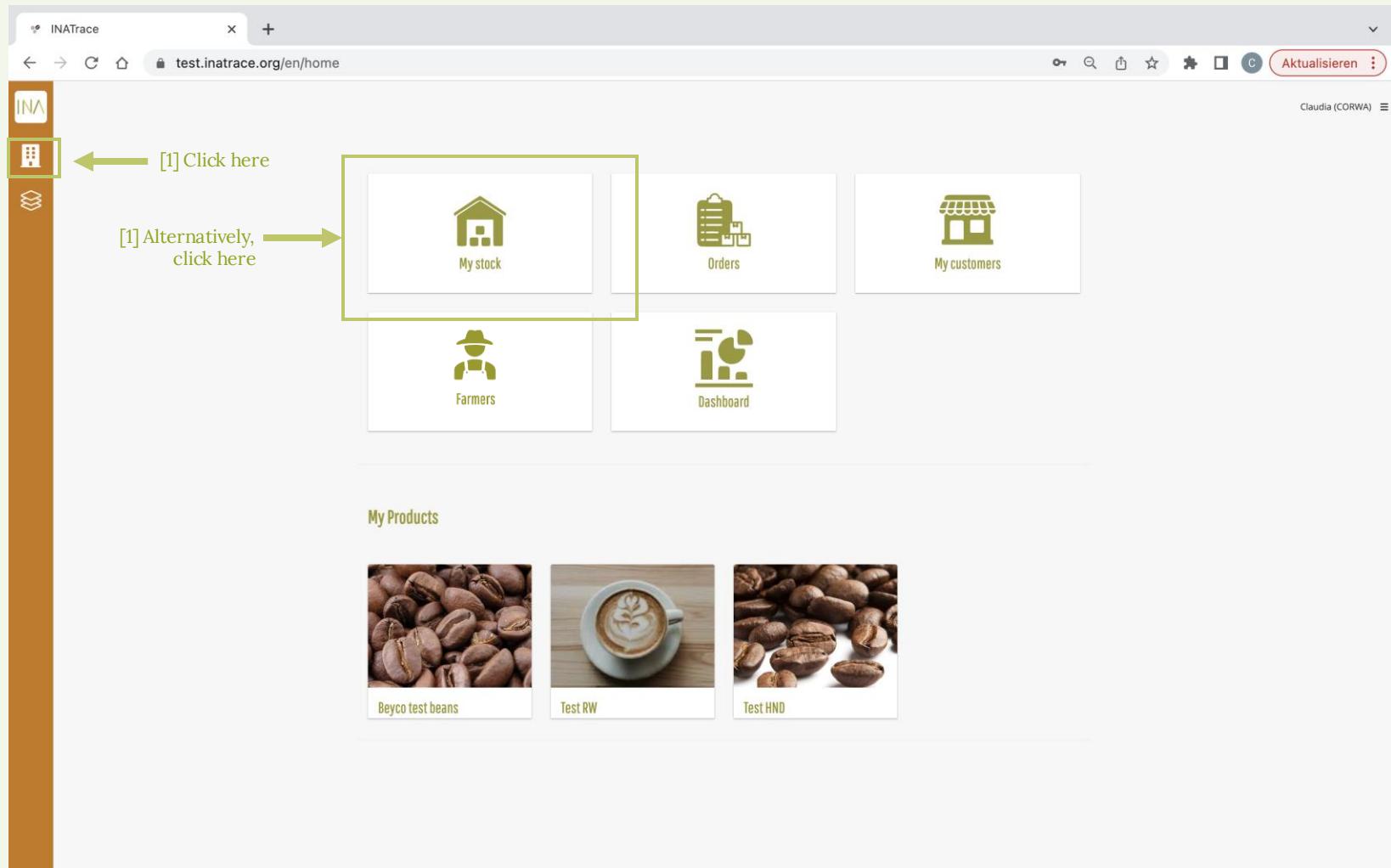
*In the following, we show how to document processing actions for an exemplary coffee supply chain. In case you as a buyer company buy final products (=finished end-customer products), this chapter is not relevant for you.*

KEEP IN MIND:

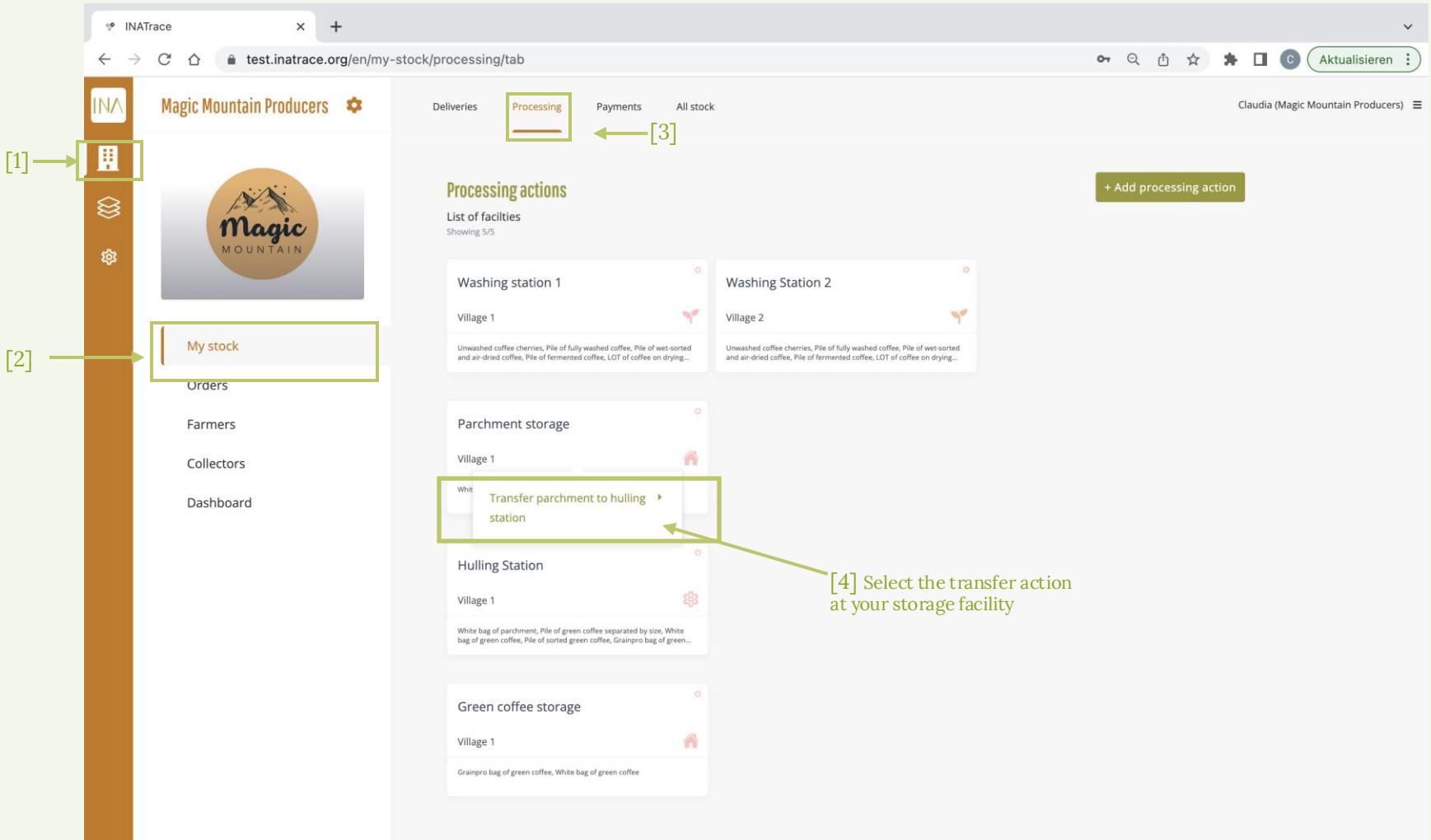
- **All processes need to be recorded in a chronological order** AFTER you approved the orders which were fulfilled by your supplier
- You will need to identify your product batch through all processing steps. The system will therefore ask you for an **internal lot number which represents the unique identifier for your batch**.
- Make sure to **select the correct output facility**, especially in case your product changes the location as part of a specific processing action. Example: The input facility for your processing action 2 needs to be the same one as your output facility of processing action 1. Otherwise you will not be able to select your batch for processing action 2.

## 4.1 Transfers to other facilities

To record the transaction, click on the “Company” icon as shown on the screenshot below which leads you to “My Stock”. You can also go directly to “My stock” tile as shown below.



Hover on the tile of the parchment storage where the processing action is to be done. In this example, we click on **“Transfer parchment to hulling station”** to move the coffee to the hulling station.



**“Add transfer action”** page appears with prefilled information in the processing and facility fields.

The page has two main parts:

**“Material to be recorded”** meaning process input information,

**“Outputs of this recording”** which means the results after processing

**Add transfer action**

**Process input**

Choose activity that you want to record

Processing\*  
Transfer parchment to hulling station

Processing date\*  
21.7.2023

Material to be recorded

Facility\*  
Parchment storage

From D. M. LLLL To D. M. LLLL

Add new transactions

<input type="checkbox"/> Select all (White bag of parchment)	
<input type="checkbox"/> LOT 123testA1PS	500 kg
<input checked="" type="checkbox"/> LOT 123/36	53 / 53 kg
<input checked="" type="checkbox"/> LOT 123/35	60 / 60 kg
<input checked="" type="checkbox"/> LOT 123/34	60 / 60 kg
<input checked="" type="checkbox"/> LOT 123/33	60 / 60 kg
<input checked="" type="checkbox"/> LOT 123/32	60 / 60 kg

**Process output**

Outputs of this processing

Semi-product type\*  
White bag of parchment

Facility\*  
Hulling Station

Prefix ORDER Internal lot name\*  
LOT 123

## Follow below steps to document **Transfer from storage to processing facility**.

[5] Indicate the date on which the transfer is done.

**Add transfer action**

Choose activity that you want to record

Processing\*  
Transfer parchment to hulling station

Processing date\*  
21.7.2023

Outputs of this processing

Semi-product type\*  
White bag of parchment

Facility\*  
Hulling Station

Prefix ORDER Internal lot name\*  
LOT 123

Material to be recorded

Facility\*  
Parchment storage

From D. M. LLLL X To D. M. LLLL X

Add new transactions

Input	Quantity
Select all (White bag of parchment)	500 kg
LOT 123testA1PS	53 / 53 kg
LOT 123/36	60 / 60 kg
LOT 123/35	60 / 60 kg
LOT 123/34	60 / 60 kg
LOT 123/33	60 / 60 kg
LOT 123/32	60 / 60 kg
LOT 123/31	60 / 60 kg
LOT 123/30	60 / 60 kg

[6] Select the input to package and move.

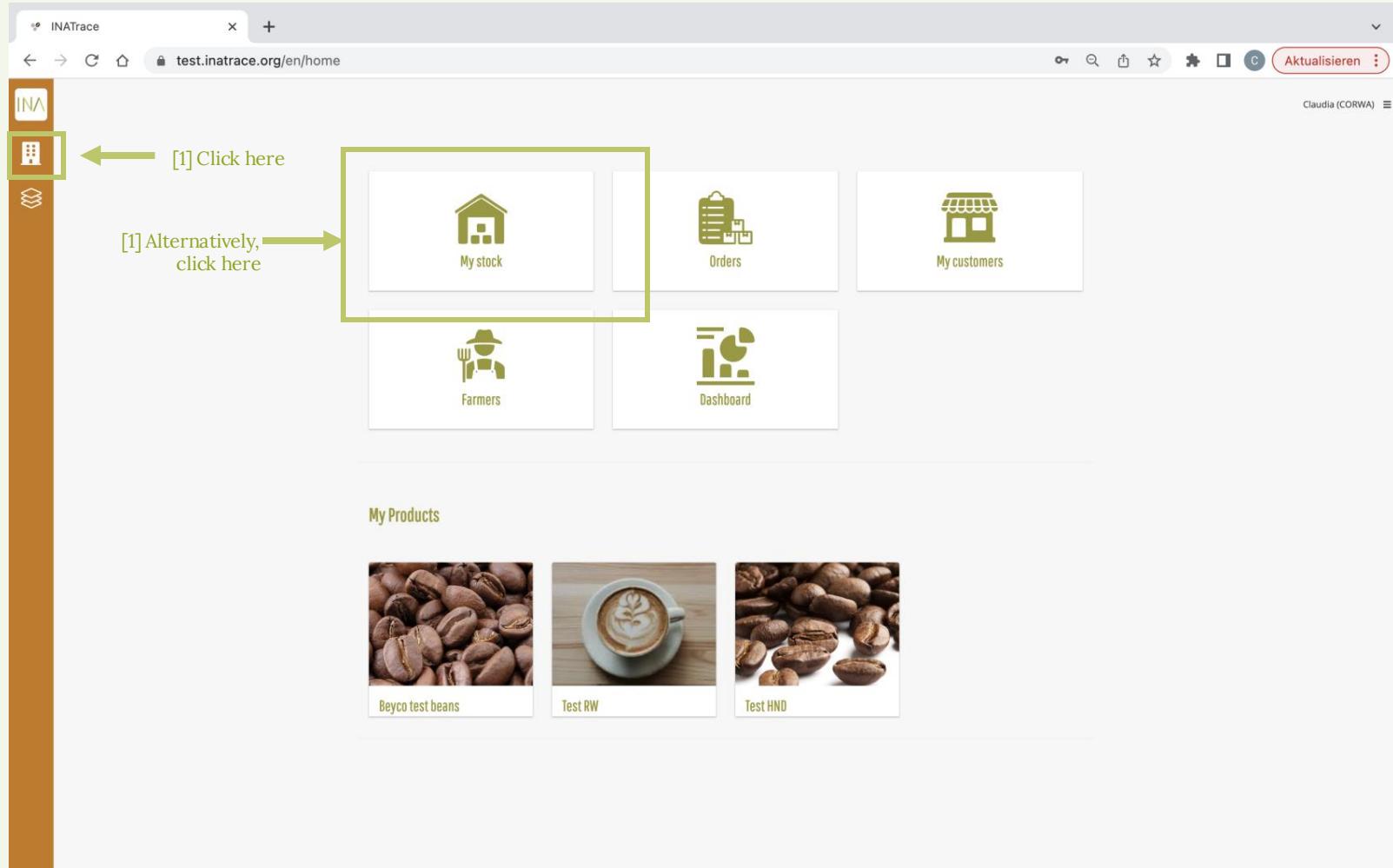
[7] Select your processing facility where your batch is transported to.

[8] Type in a unique code to identify lot in the system.

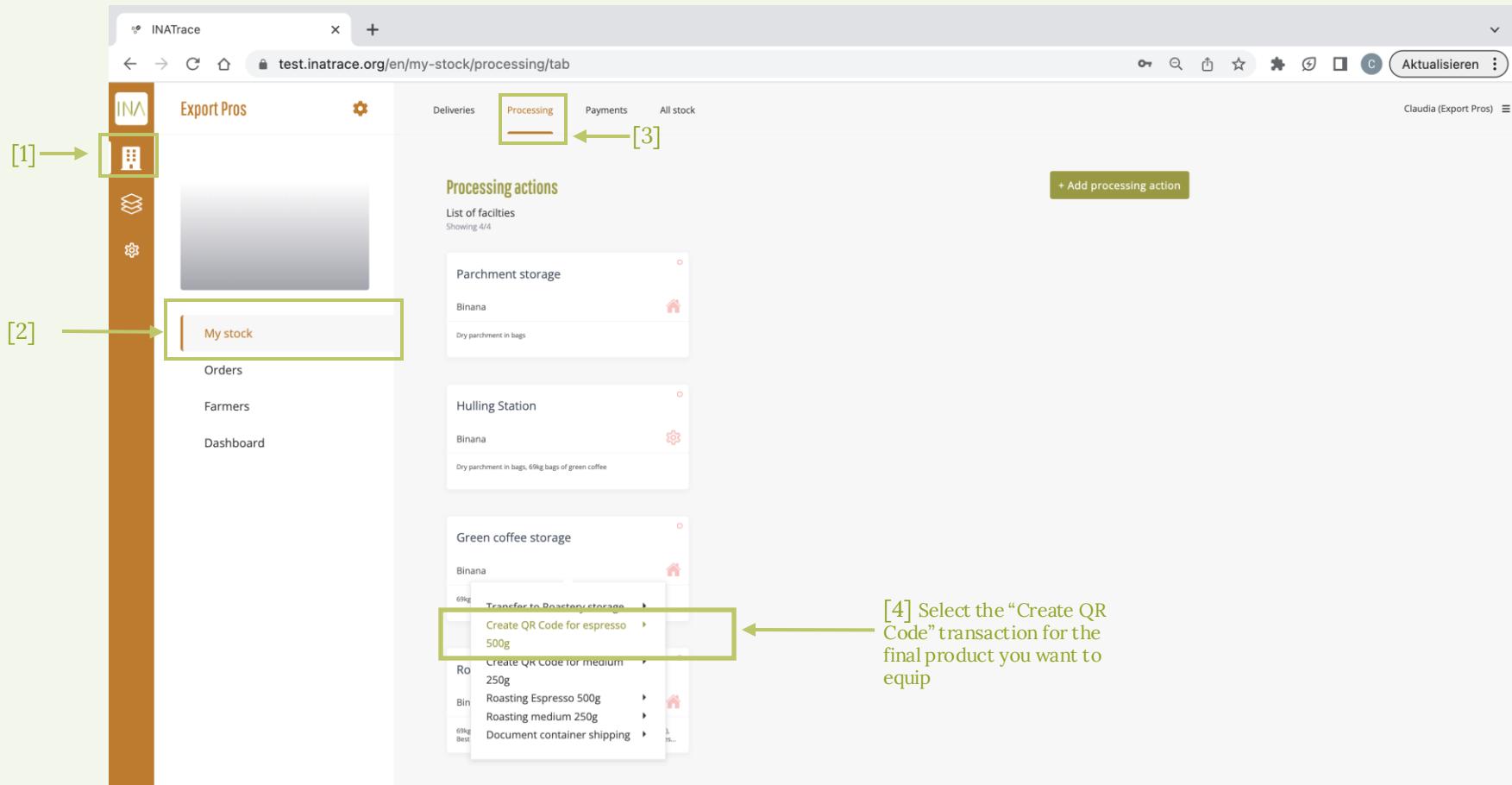
[9] Click "Save" on the bottom of the page

## 4.2 Create QR Codes

In order to create a batch-specific QR Code, you first need to make sure that you have designed your QR Label and added your Final product in the "Products" section (Chapter 2). Next, click on the "Company" icon as shown in the screenshot below which leads you to "My Stock". You can also go direct to "My stock" tile as shown below.



In order to create a batch-specific QR Code, follow the steps shown here. NOTE that the creation of QR code needs to be done before you can document the processing into final product. In case you do not work with QR codes on your products, you can skip this step.



On the left side, select all items which are part of your batch and that should be equipped with the same QR Code information. Select the facility and enter a unique identifier under “internal lot name” to identify this lot in the system later. Afterwards, click “Save” on the bottom of the page.

Add new processing action

Choose activity that you want to record

Processing\*

Create QR Code for espresso 500g

QR code for final product

CORWA Espresso 500g (Test RW)

Processing date\*

26. 7. 2023

Outputs of this processing

Semi-product type\*

69kg bags of green coffee

Facility\*

Roastery storage

Prefix

internal lot name\*

ORDER

ORDER Test25072023/1/

Material to be recorded

Facility\*

Green coffee storage

From

D, M, LLLL

To

D, M, LLLL

Search

Filter

Add new transactions

Select all (69kg bags of green coffee)

ORDER Test25072023/1/29

ORDER Test25072023/1/28

ORDER Test25072023/1/27

ORDER Test25072023/1/26

ORDER Test25072023/1/25

ORDER Test25072023/1/24

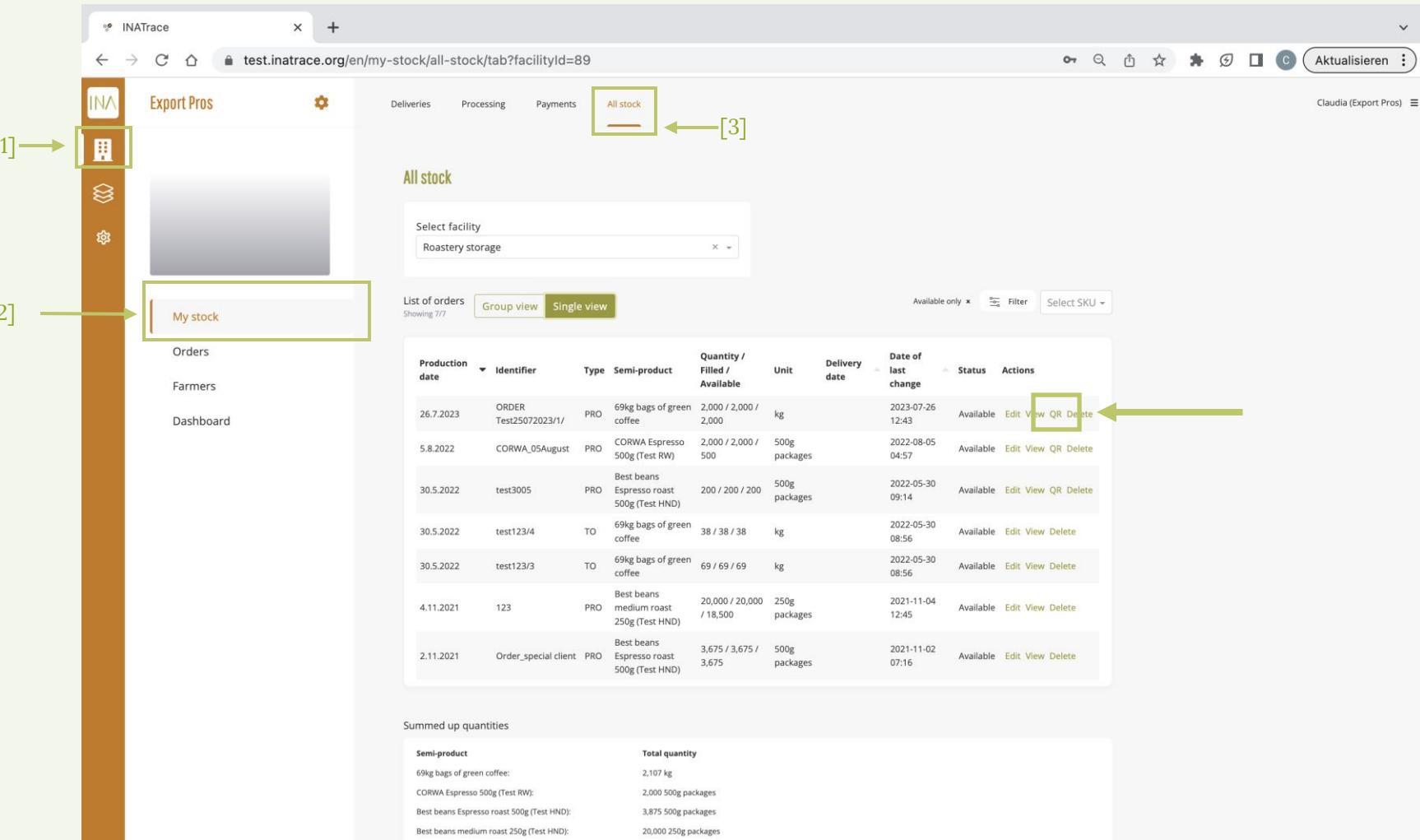
ORDER Test25072023/1/23

68 / 68 kg

69 / 69 kg

Select

If you switch to the “All stock” section and select “Single view”, you will find the QR Code you just added.



The screenshot shows the INATrace web interface with the following highlights:

- [1]** Points to the 'My stock' button in the sidebar.
- [2]** Points to the 'Single view' button in the 'List of orders' section.
- [3]** Points to the 'All stock' button in the top navigation bar.
- QR Code**: A QR code is visible in the 'Single view' table for the first item (26.7.2023, ORDER Test25072023/1).

**INATrace** - test.inatrace.org/en/my-stock/all-stock/tab?facilityId=89

**Export Pros**

Deliveries Processing Payments All stock

Claudia (Export Pros)

**My stock**

**All stock**

Select facility: Roastery storage

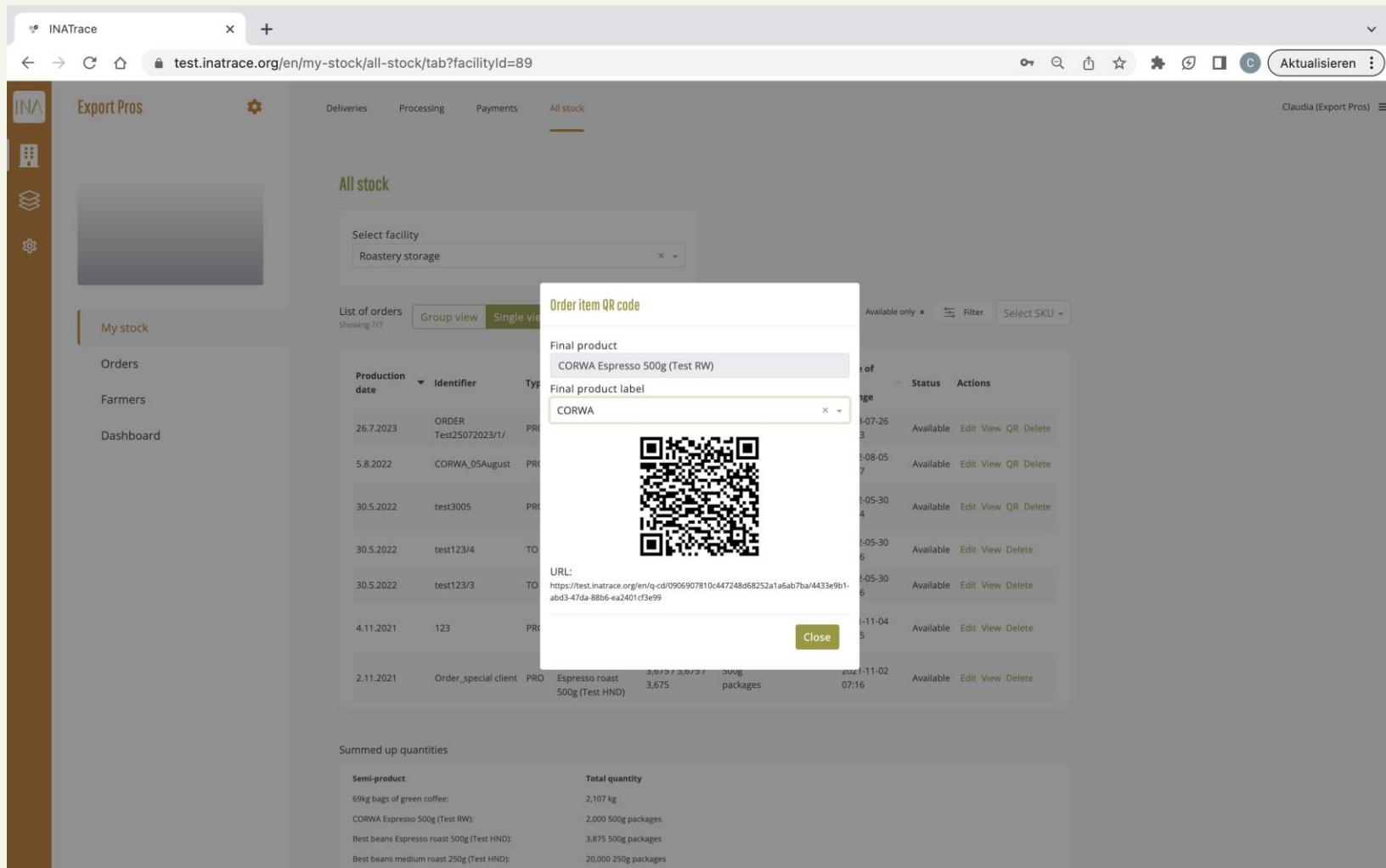
List of orders (Showing 7/7) Group view Single view Available only Filter Select SKU

Production date	Identifier	Type	Semi-product	Quantity / Filled / Available	Unit	Delivery date	Date of last change	Status	Actions
26.7.2023	ORDER Test25072023/1/	PRO	69kg bags of green coffee	2,000 / 2,000 / 2,000	kg		2023-07-26 12:43	Available	Edit View QR Delete
5.8.2022	CORWA_05August	PRO	CORWA Espresso 500g (Test RW)	2,000 / 2,000 / 500	500g packages		2022-08-05 04:57	Available	Edit View QR Delete
30.5.2022	test3005	PRO	Best beans Espresso roast 500g (Test HND)	200 / 200 / 200	500g packages		2022-05-30 09:14	Available	Edit View QR Delete
30.5.2022	test123/4	TO	69kg bags of green coffee	38 / 38 / 38	kg		2022-05-30 08:56	Available	Edit View Delete
30.5.2022	test123/3	TO	69kg bags of green coffee	69 / 69 / 69	kg		2022-05-30 08:56	Available	Edit View Delete
4.11.2021	123	PRO	Best beans medium roast 250g (Test HND)	20,000 / 20,000 / 18,500	250g packages		2021-11-04 12:45	Available	Edit View Delete
2.11.2021	Order_special client	PRO	Best beans Espresso roast 500g (Test HND)	3,675 / 3,675 / 3,675	500g packages		2021-11-02 07:16	Available	Edit View Delete

Summed up quantities

Semi-product	Total quantity
69kg bags of green coffee:	2,107 kg
CORWA Espresso 500g (Test RW):	2,000 500g packages
Best beans Espresso roast 500g (Test HND):	3,875 500g packages
Best beans medium roast 250g (Test HND):	20,000 250g packages

You can either copy the URL displayed or simply click on the QR Code to copy the URL. By pasting it into a new browser tab you can verify the information on the B2C page behind the QR code.



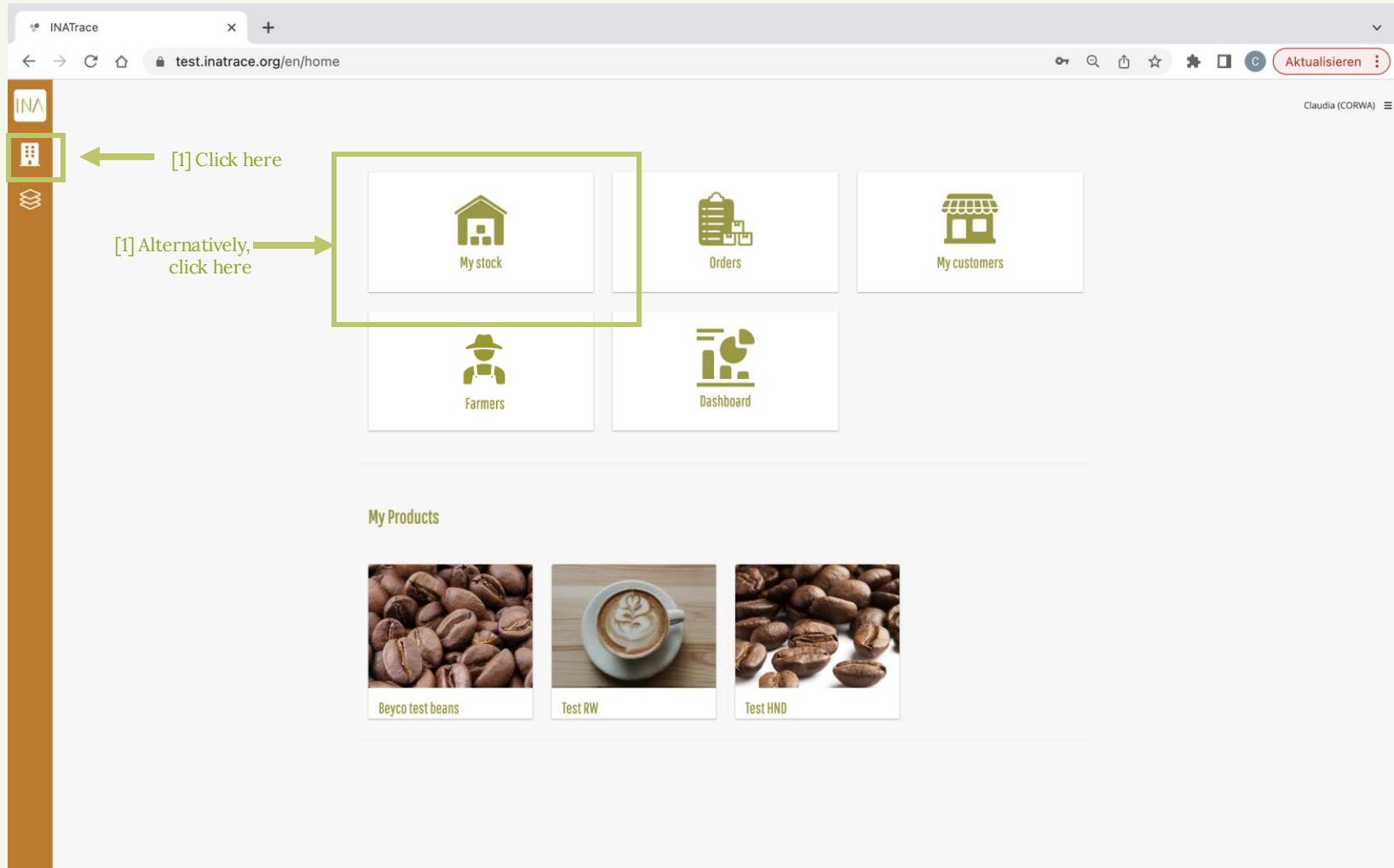
The screenshot shows the INATrace B2B platform interface. The main menu includes 'Deliveries', 'Processing', 'Payments', and 'All stock'. The 'All stock' tab is active, showing a list of items. A modal window is open, titled 'Order item QR code', displaying the following information:

- Final product:** CORWA Espresso 500g (Test RW)
- Final product label:** CORWA
- URL:** <https://test.inatrace.org/en/q-cd/0906907810c447248d68252a1a6ab7ba/4433e9b1-abd3-47da-88b6-ea2401cf3e99>
- QR Code:** A square QR code representing the product information.

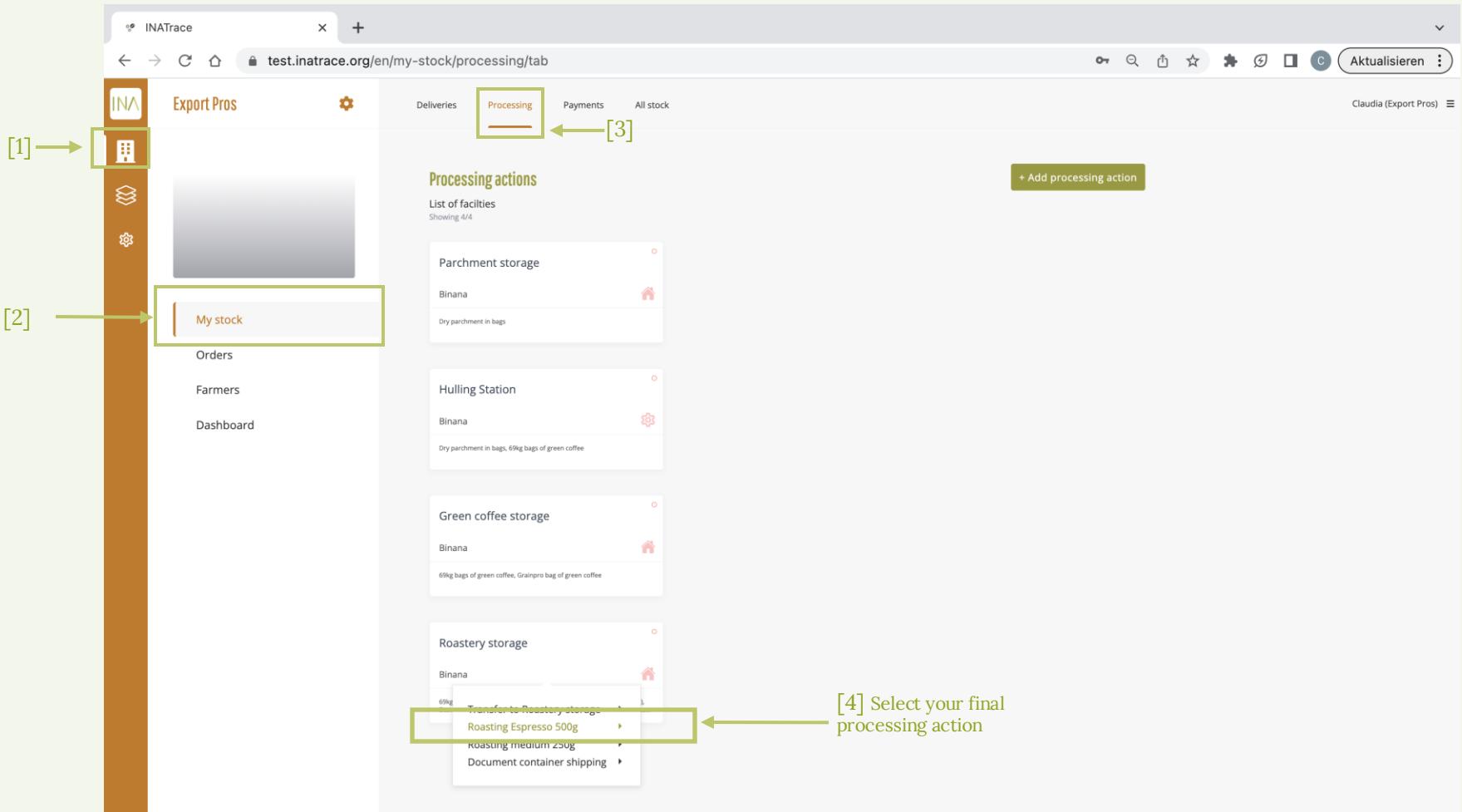
The background shows a table of stock items with columns for 'Production date', 'Identifier', 'Type', 'Status', and 'Actions'. The table includes rows for various products like 'CORWA Espresso 500g (Test RW)' and 'Best beans Espresso roast 500g (Test HND)'.

## 4.3 Processing into final products

To record a processing action at your processing facility, click on the “Company” icon as shown on the screenshot below which leads you to “My Stock”. You can also go direct to “My stock” tile as shown below.



Hover over the tile of the facility where the processing action is to start and click on the processing action. In our example, we click on “**Roasting Espresso 500g**”.



Follow below steps to document your **final processing action**.

The screenshot shows a software interface for 'Add final processing action'. The process is divided into two main sections: 'Choose activity that you want to record' and 'Outputs of this processing'.

**Choose activity that you want to record:**

- Processing\***: Roasting Espresso 500g
- Processing date\***: 26.7.2023

**Outputs of this processing:**

- Final product type**: CORWA Espresso 500g (Test RW)
- Facility\***: Roastery storage
- Prefix**: ORDER
- Internal lot name\***: Enter internal lot name
- Output quantity in 500g packages**: Enter quantity
- Roasting profile**: (empty)
- Flavour profile**: (empty)
- Cupping score**: (empty)

**Material to be recorded:**

**Facility\***: Roastery storage

**From**: D. M. LLLL **To**: D. M. LLLL

**Add new transactions**:

- Select all (69kg bags of green coffee)
- ORDER ORDER Test25072023 1/ QR
- ORDER test123/4
- ORDER test123/3

**QR Code of this batch** (A QR code is generated for the selected batch, labeled 'QR Code of this batch').

**Total quantities:**

- Input quantity in kg**: 2000.00
- Remaining quantity in kg**: 2000.00

[5] Indicate the date on which the processing action is done.

[6] Select the input to process. Make sure to select the batch with the correct unique identifier which holds your previously created QR code

[7] Select the processing facility (e.g. roastery storage) where this process ENDS

[8] Type in a unique code to identify the batch in the system.

[9] Type in cumulative quantity gotten at the end of this process.

[10] Complete additional information depending on your company settings.

[11] Click "save" on the bottom of the page

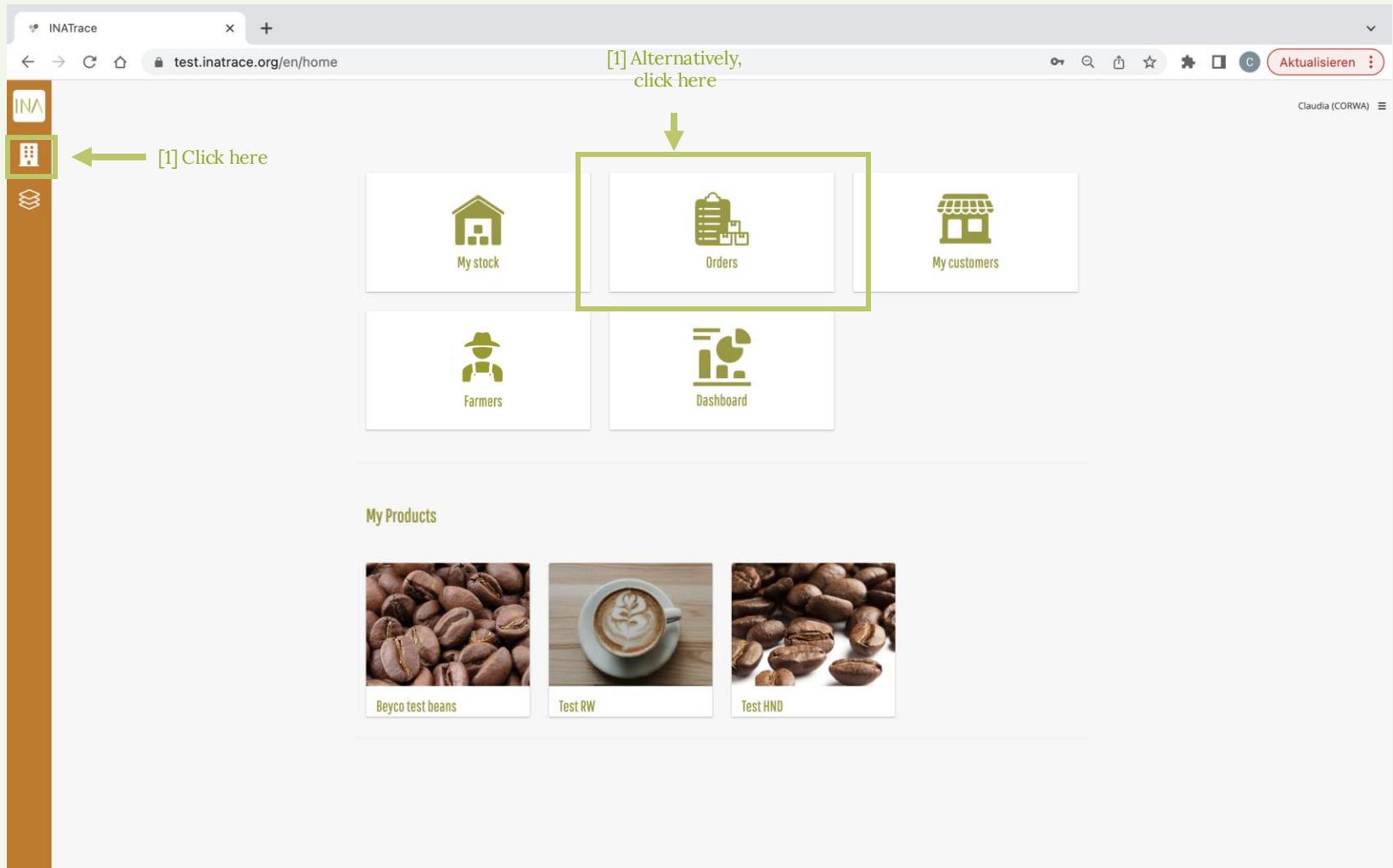
## Chapter 5.

# Payment module

This module helps system users to document transactions related to payments to suppliers.

## 5.1 Record an order payment

To record an order payment, click on the “Company” icon as shown on the screenshot below which leads you to “My Stock”. Next, select “Orders” from the submenu. You can also go direct to the “Orders” tile as shown below.



Go to “Orders”, then click on the “Add balance payment” button to document a payment to your supplier for a specific order.

The screenshot shows the INATrace web interface with the following highlights:

- [1]** Points to the 'Orders' icon in the sidebar.
- [2]** Points to the 'Orders' section in the sidebar.
- [3]** Points to the 'Placed orders' tab in the header.
- [4]** Points to the 'Add balance payment' button in the 'Actions' column for the first order in the list.

**Placed orders**

Selected facility  
Select facility

List of orders  
Showing 10/14

Filter

Date of delivery	SKU	Customer	Order ID	Ordered to	Quantity / Fulfilled	Unit	kgs	Time of last change	Actions
2023-08-01	Grainpro bag of green coffee		Test25072023	Magic Mountain Producers (Green coffee storage)	100 / 100	kg	100	2023-07-25 11:08	<a href="#">Edit</a> <a href="#">View</a> <a href="#">Approve/Reject</a> <a href="#">Add balance payment</a> <a href="#">Delete</a>
2023-08-01	Grainpro bag of green coffee	Test0815		Magic Mountain Producers (Green coffee storage)	100 / 100	kg	100	2023-07-24 04:30	<a href="#">Edit</a> <a href="#">View</a> <a href="#">Approve/Reject</a> <a href="#">Add balance payment</a>
2023-04-01	Grainpro bag of green coffee	Test150323		Magic Mountain Producers (Green coffee storage)	100 / 100	kg	100	2023-06-22 04:40	<a href="#">Edit</a> <a href="#">View</a> <a href="#">Approve/Reject</a> <a href="#">Add balance payment</a>
2023-06-29	Grainpro bag of green coffee	123		Magic Mountain Producers (Green coffee storage)	123 / 123	kg	123	2023-06-22 04:40	<a href="#">Edit</a> <a href="#">View</a> <a href="#">Approve/Reject</a> <a href="#">Add balance payment</a>
2023-03-23	Dry parchment in bags	PA-TEST-14-03-2023		Montaña Mágica Productores (Almacén de pergaminos secos)	15 / 0	qq	679.5	2023-03-14 07:14	<a href="#">Edit</a> <a href="#">View</a> <a href="#">Approve/Reject</a> <a href="#">Add balance payment</a>
2022-08-05	69kg bags of green coffee	CORWA_ESP_500_EP		Magic Mountain Producers (Green coffee storage)	1000 / 1000	kg	1000	2023-03-14 10:43	<a href="#">Edit</a> <a href="#">View</a> <a href="#">Approve/Reject</a> <a href="#">Add balance payment</a>
2023-03-01	Dry parchment in bags	Test25012023		Montaña Mágica Productores (Almacén de pergaminos secos)	200 / 200	qq	9060	2023-01-25 07:50	<a href="#">Edit</a> <a href="#">View</a> <a href="#">Approve/Reject</a> <a href="#">Add balance payment</a>
2022-12-15	69kg bags of green coffee	12345		Montaña Mágica Productores (Green coffee storage)	500 / 30	kg	500	2023-01-25 07:40	<a href="#">Edit</a> <a href="#">View</a> <a href="#">Approve/Reject</a> <a href="#">Add balance payment</a>
2022-09-01	Dry parchment in	333test		Montaña Mágica Productores (Almacén de	200 / 7.5	qq	9060	2023-01-25 07:24	<a href="#">Edit</a> <a href="#">View</a> <a href="#">Approve/Reject</a> <a href="#">Add balance payment</a>

The “**New Payment**” page will appear with some prefilled information. You fill in all information related to the selected payment such as payment purpose, payment type, amount to be paid to the supplier company, receipt number and upload a signed receipt as per the below screen. To save the transaction, click on save.

**New payment**

**Basic information**

[5] Select payment date. 

Payment date\*  
26.7.2023

Payable from  
Export Pros

Payable to  
Company  
or  
Collector  
or  
Farmer

Magic Mountain Producers

Order reference  
Test25072023

Payment purpose\*  
Select option ...

Payment type\*  
Bank transfer

Amount paid\*  
Enter amount

Currency\*  
Select from codes ...

Receipt number\*  
Enter receipt number

Type\*  
Receipt

Signed receipt (PDF/PNG/JPG)  
Choose file

[6] Select purpose of payment 

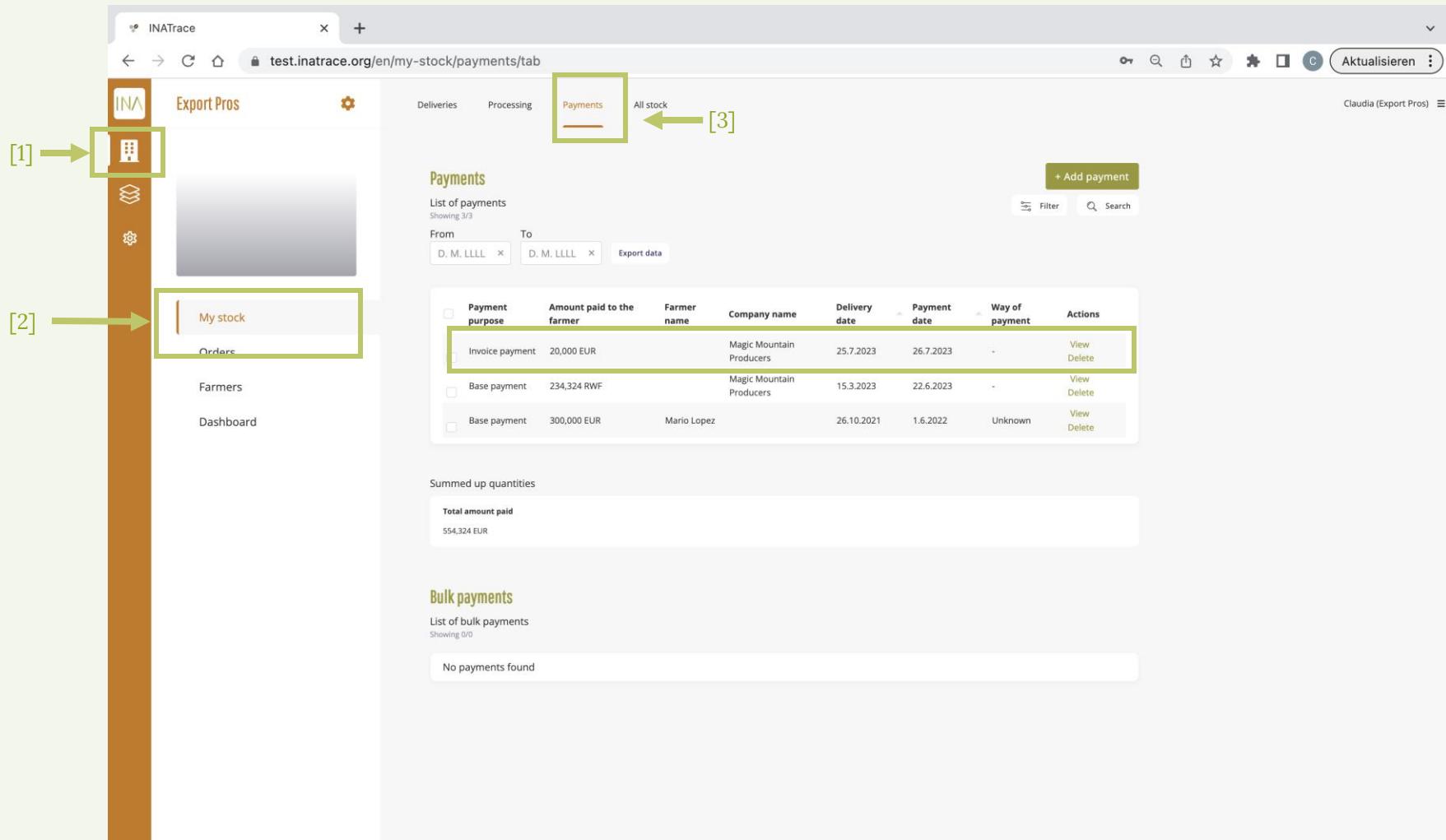
[7] Define amount paid and currency 

[8] Input receipt number 

[9] Upload receipt / proof of payment 



The payment recorded will then be displayed in the list of payments as below.



The screenshot shows the INATrace software interface for managing payments. The left sidebar, labeled 'Export Pros', contains icons for 'INATrace' (highlighted with [1]), 'My stock' (highlighted with [2]), and 'Orders'. The main content area is titled 'Payments' and shows a table of recorded payments. The table has columns for 'Payment purpose', 'Amount paid to the farmer', 'Farmer name', 'Company name', 'Delivery date', 'Payment date', 'Way of payment', and 'Actions'. Three specific rows are listed:

Payment purpose	Amount paid to the farmer	Farmer name	Company name	Delivery date	Payment date	Way of payment	Actions
Invoice payment	20,000 EUR		Magic Mountain Producers	25.7.2023	26.7.2023	-	<a href="#">View</a> <a href="#">Delete</a>
Base payment	234,324 RWF		Magic Mountain Producers	15.3.2023	22.6.2023	-	<a href="#">View</a> <a href="#">Delete</a>
Base payment	300,000 EUR	Mario Lopez		26.10.2021	1.6.2022	Unknown	<a href="#">View</a> <a href="#">Delete</a>

Below the table, a section titled 'Summed up quantities' shows the total amount paid: 554,324 EUR. The bottom section, titled 'Bulk payments', shows a list with the message 'No payments found'.

## Chapter 6.

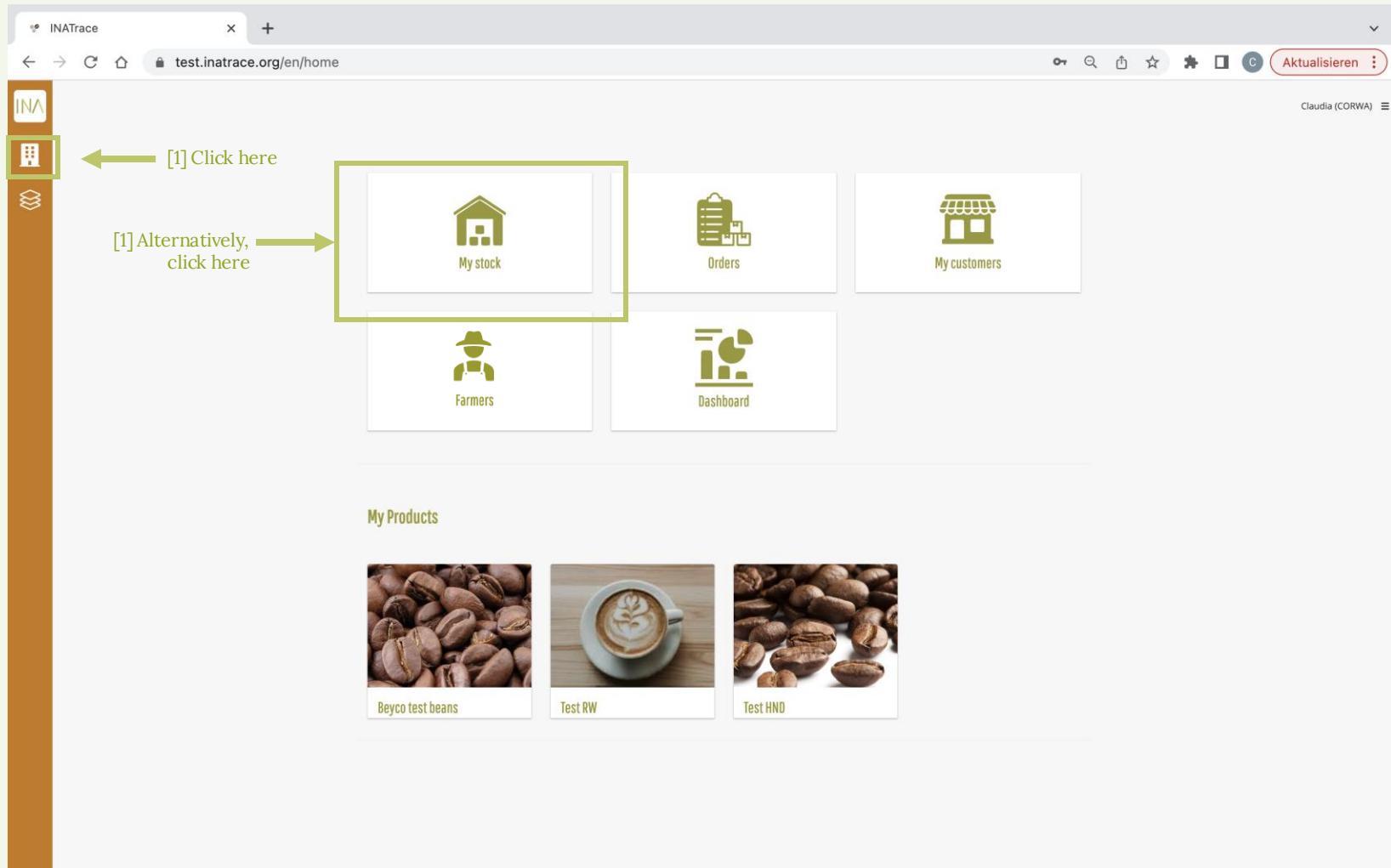
# All stock module

This module allows system users to view the batch history as well as to edit or delete incorrectly recorded transactions.

For coffee value chains, this module also allows offering stock items on the Beyco green coffee sales platform.

## 6.1 View stock and batch history

To access the stock and view the history of a batch, click on the “Company” icon as shown on the screenshot below which leads you to “My Stock”. You can also go direct to “My stock” tile as shown below.



To view the history of a batch, follow the steps below. In case your batch shows as “available” you are also able to edit or delete the LAST transaction performed on it. Remove the “Available only” filter to see all batches. In case your batch shows as “not available”, it might already be processed further and will be found as “available” in another facility of your company. If you wish to see individual items of a batch or any QR codes that might exist for this batch, switch to “single view”.

INATrace

Magic Mountain Producers

Deliveries Processing Payments

All stock [3]

Select facility [4] Select facility

My stock [2]

Orders

Farmers

Collectors

Dashboard

All stock

Select facility

Green coffee storage

List of grouped orders Showing 4/4

Group view Single view

Production date Identifier No. of sacks Type Semi-product Quantity / Filled / Available Unit Delivery date Date of last change Status Actions

14.3.2023	JUL1	/	PRO	Grainpro bag of green coffee	25 / 25 / 25	kg	2023-03-14 09:40	Available	Edit View Delete [5]
17.12.2021	15112021/3	/	TO	Grainpro bag of green coffee	15 / 15 / 15	kg	2022-01-03 12:36	Available	Edit View Delete
3.1.2022	15112021/1	/	TO	Grainpro bag of green coffee	50 / 50 / 22	kg	2022-01-03 12:36	Available	Edit View Delete
3.1.2022	15112021/2	/	TO	Grainpro bag of green coffee	60 / 60 / 60	kg	2022-01-03 12:36	Available	Edit View Delete

Summed up quantities

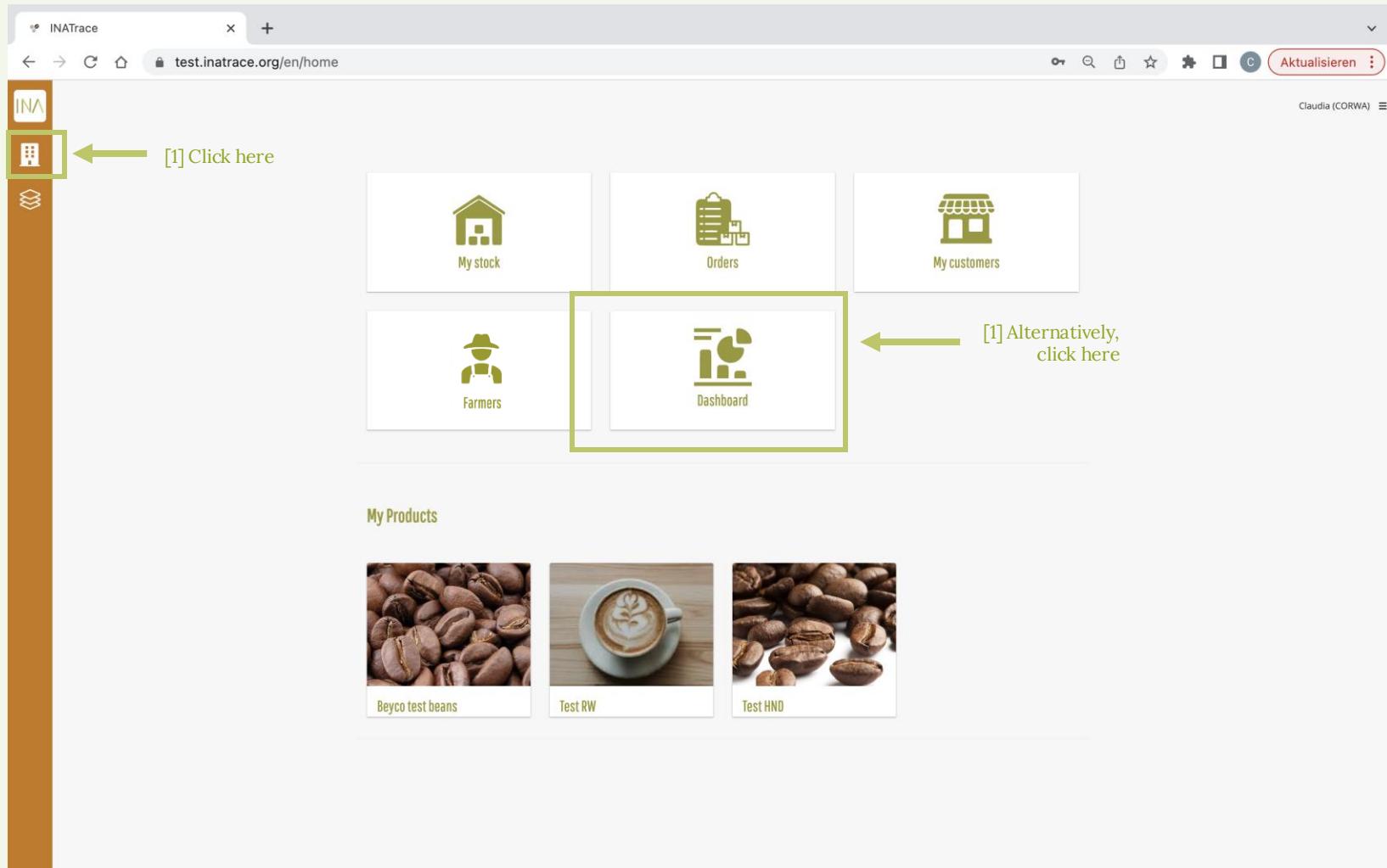
Semi-product	Total quantity
Grainpro bag of green coffee:	150 kg

## Chapter 7. Dashboard

This module allows system users to view aggregated data previously entered into the system and export the data.

## 7.1 Processing dashboard

To access the dashboard of your company/organisation, click on the “Company” icon as shown on the screenshot below and select “Dashboard” from the submenu. You can also go directly to “Dashboard” tile as shown below.



To see the “Processing performance” dashboard, scroll down on the dashboard page. You can select a date range and switch to daily, weekly or yearly view. You need to select a facility and the corresponding process you would like to see the performance for. Periods with zero data entries, will not show any bars. In order to export the data, select either Excel, PDF or CSV format and click “Export data”. Note that for large time periods it will not be possible to display all bars, however all data will still be exported up to a maximum time range of 3 years.

**Magic Mountain Producers** 



[My stock](#)

[Orders](#)

[Farmers](#)

[Collectors](#)

[Dashboard](#)

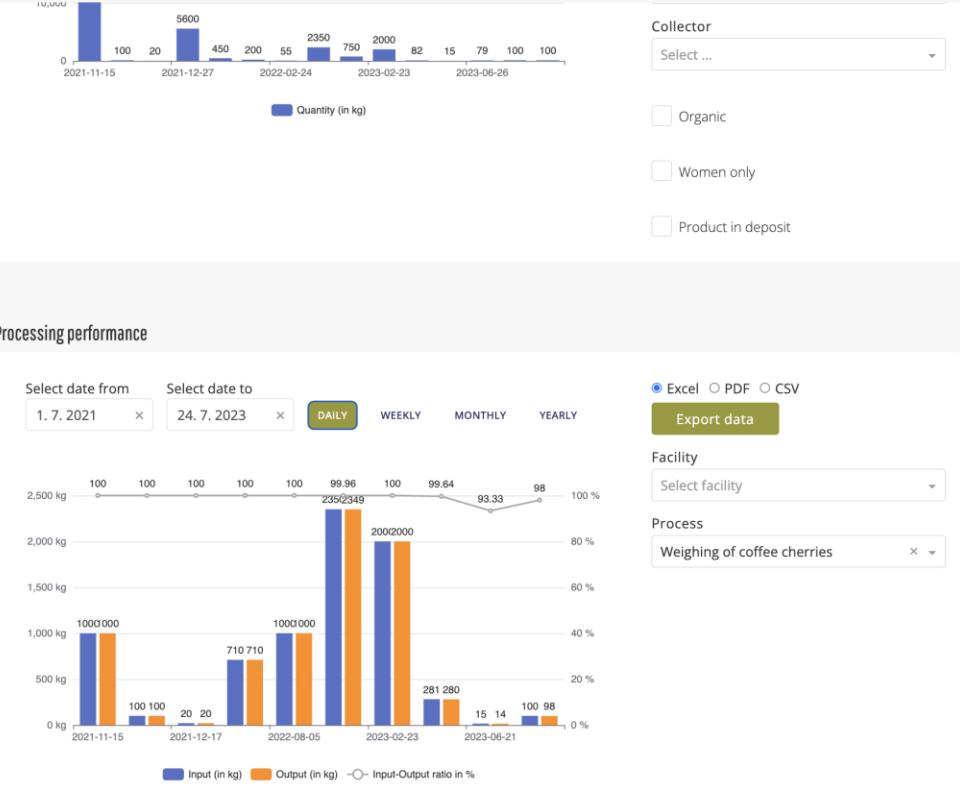
**Processing performance**

Select date from  Select date to  **DAILY** WEEKLY MONTHLY YEARLY

Excel  PDF  CSV **Export data**

Facility

Process



The dashboard displays processing performance data from November 2021 to June 2023. It includes a bar chart for daily data and a line chart for monthly data. The chart shows Input (in kg) in blue and Output (in kg) in orange. The Input-Output ratio in % is shown as a line with diamond markers. The Y-axis for the bar chart ranges from 0 kg to 2,500 kg, and the Y-axis for the line chart ranges from 0 % to 100 %.

Date	Input (in kg)	Output (in kg)	Input-Output ratio (%)
2021-11-15	100	100	100
2021-12-17	20	20	20
2022-08-05	710	710	100
2023-02-23	2350	2349	99.96
2023-06-21	15	14	93.33
2023-06-26	100	98	98

**Collector**

Organic

Women only

Product in deposit

## Chapter 8.

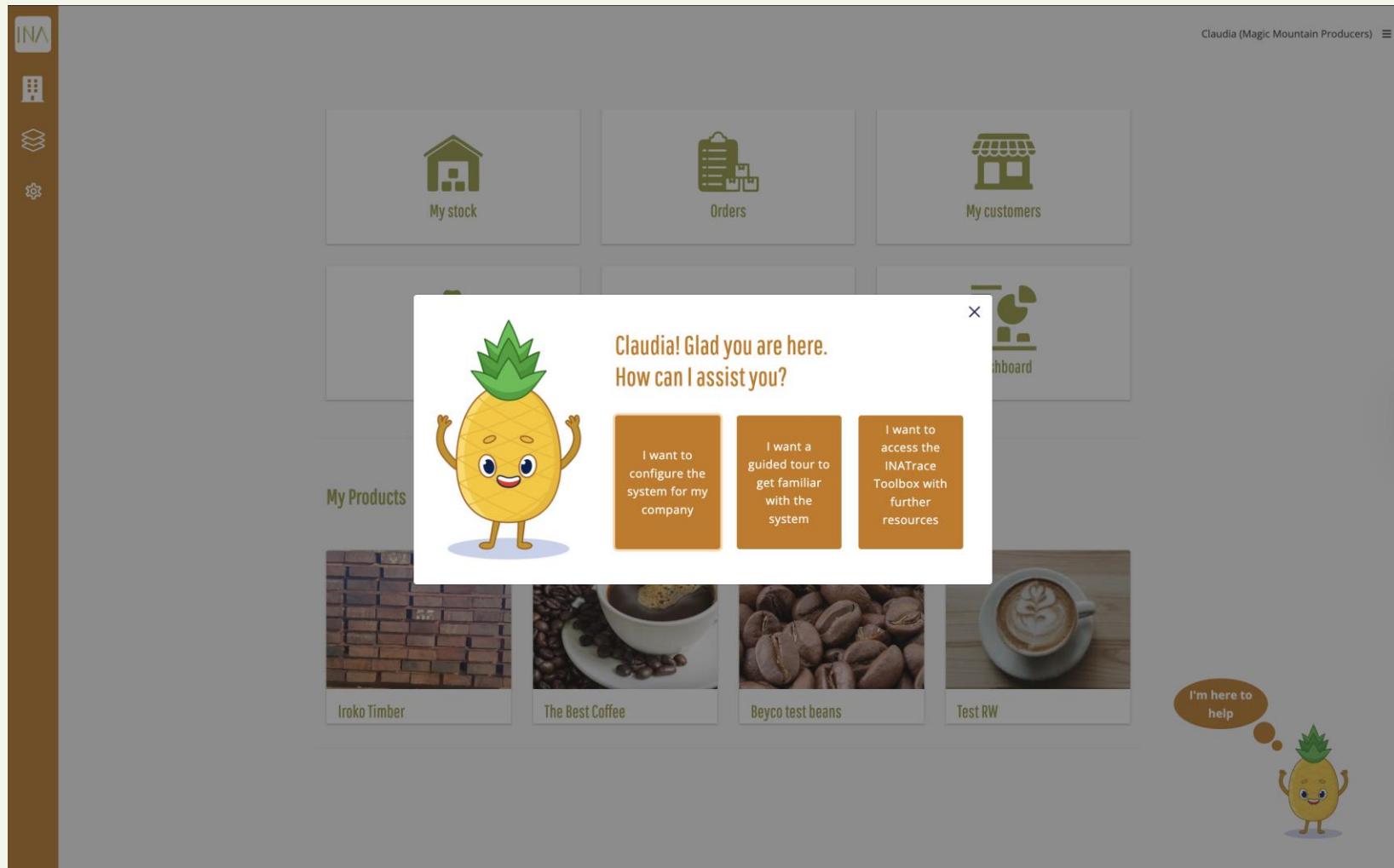
# Company configuration (ADMIN ONLY)

This module guides company admins to change configuration of their company.

If you are just getting started with INATrace and need to set up the configuration for your company, make sure that you have “company admin” rights to start with. To find out where you find all parts of the company configuration and add first configurations, you can click on Mr. Pineapple in the lower right corner of the user interface.

The screenshot shows the INATrace user interface. On the left is a vertical orange sidebar with icons for navigation. The main content area has a white header with the text "Claudia (Magic Mountain Producers)" and a menu icon. Below the header is a grid of six icons arranged in two rows of three. The top row includes "My stock" (house icon), "Orders" (bag and boxes icon), and "My customers" (storefront icon). The bottom row includes "Farmers" (farmer icon), "Collectors" (truck icon), and "Dashboard" (bar chart icon). Below this grid is a section titled "My Products" with four items: "Iroko Timber" (image of a wooden wall), "The Best Coffee" (image of a cup of coffee), "Beyco test beans" (image of coffee beans), and "Test RW" (image of a latte). In the bottom right corner, there is a cartoon pineapple character with a speech bubble that says "I'm here to help".

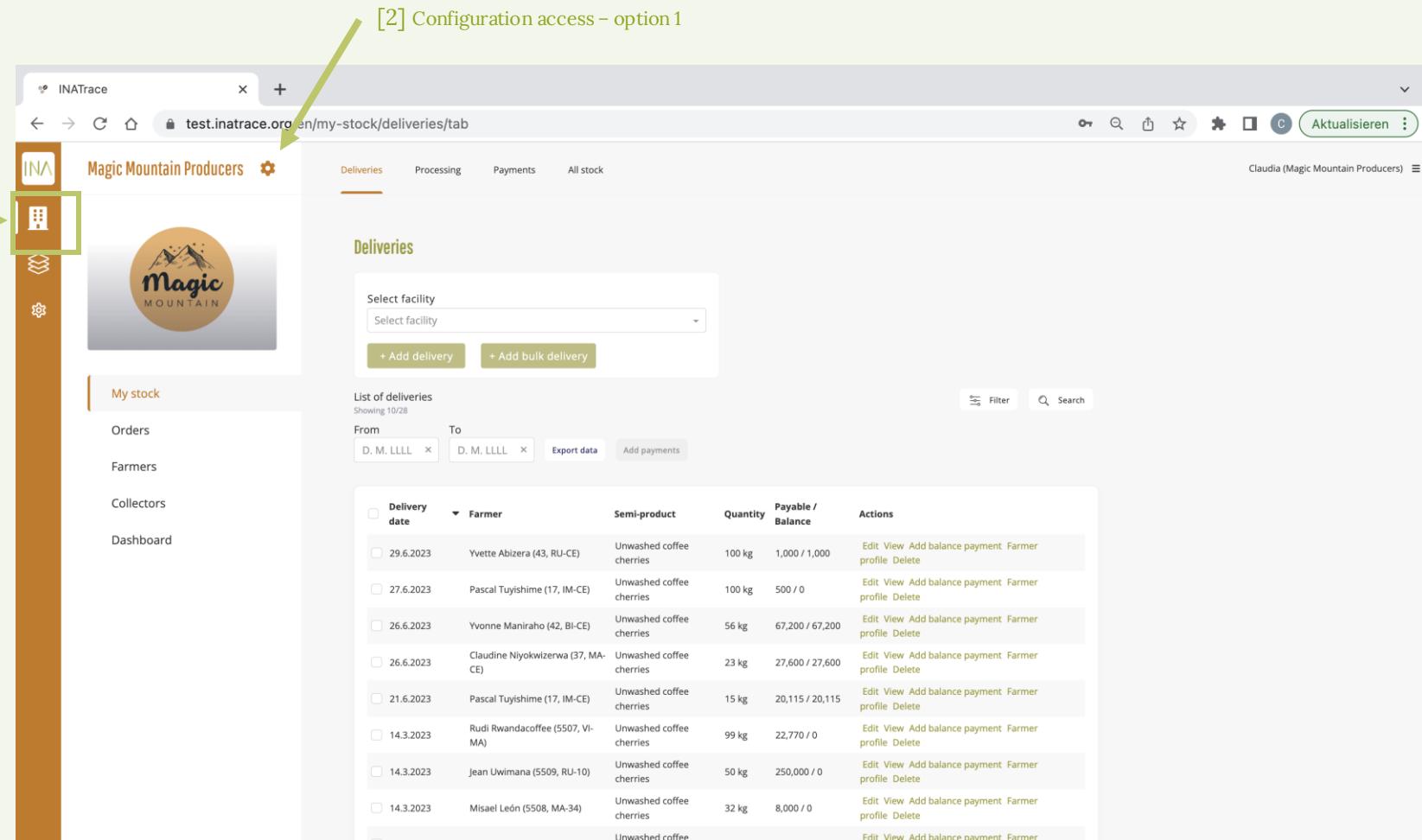
Next: Click on “I want to configure the system for my company” and start completing the checklist. Alternatively, you can also start with a guided tour through the system to get familiar with the functionalities or access additional user manuals and admin guides.



## 8.1 Access your company profile - Option 1

To access the company profile of your company/organisation, click on the “Company” icon as shown on the screenshot below the company profile icon which allows you to have configuration access.

[2] Configuration access - option 1



The screenshot shows the INATrace web interface for a company named "Magic Mountain Producers". The sidebar on the left includes icons for "My stock", "Orders", "Farmers", "Collectors", and "Dashboard". The main content area is titled "Deliveries" and shows a list of deliveries. At the top right of the interface, there is a "Configuration" icon (a gear symbol) and a "Configuration access - option 1" label. A green arrow points from this label to the configuration icon. Another green arrow points from the configuration icon to a "Configuration access - option 2" label.

Deliveries

Select facility

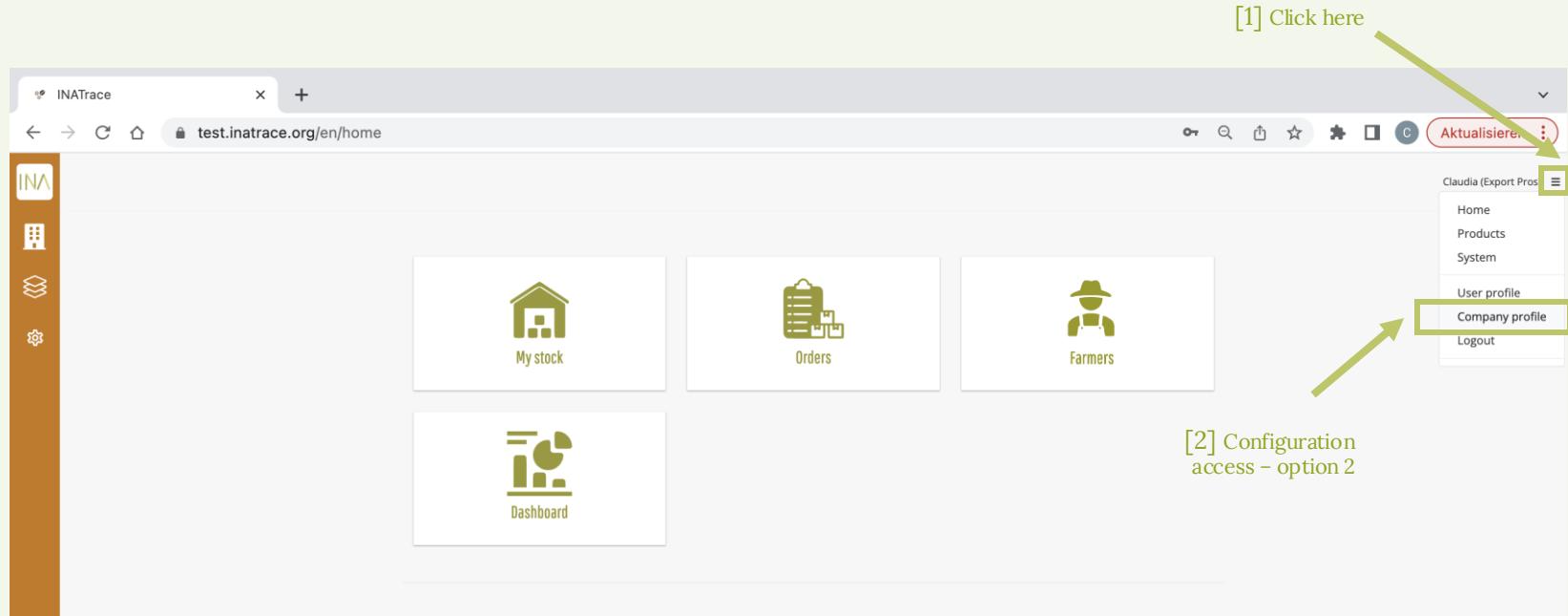
+ Add delivery + Add bulk delivery

List of deliveries  
Showing 10/28

From To  
D. M. LLLL D. M. LLLL Export data Add payments

Delivery date	Farmer	Semi-product	Quantity	Payable / Balance	Actions
29.6.2023	Yvette Abizera (43, RU-CE)	Unwashed coffee cherries	100 kg	1,000 / 1,000	Edit View Add balance payment Farmer profile Delete
27.6.2023	Pascal Tuyishime (17, IM-CE)	Unwashed coffee cherries	100 kg	500 / 0	Edit View Add balance payment Farmer profile Delete
26.6.2023	Yvonne Maniraho (42, BI-CE)	Unwashed coffee cherries	56 kg	67,200 / 67,200	Edit View Add balance payment Farmer profile Delete
26.6.2023	Claudine Nyokwizerwa (37, MA-CE)	Unwashed coffee cherries	23 kg	27,600 / 27,600	Edit View Add balance payment Farmer profile Delete
21.6.2023	Pascal Tuyishime (17, IM-CE)	Unwashed coffee cherries	15 kg	20,115 / 20,115	Edit View Add balance payment Farmer profile Delete
14.3.2023	Rudi Rwandacoffee (5507, VI-MA)	Unwashed coffee cherries	99 kg	22,770 / 0	Edit View Add balance payment Farmer profile Delete
14.3.2023	Jean Uwimana (5509, RU-10)	Unwashed coffee cherries	50 kg	250,000 / 0	Edit View Add balance payment Farmer profile Delete
14.3.2023	Misael León (5508, MA-34)	Unwashed coffee cherries	32 kg	8,000 / 0	Edit View Add balance payment Farmer profile Delete
		Unwashed coffee			Edit View Add balance payment Farmer profile Delete

## 8.1 Access your company profile - Option 2



## 8.2 Edit Company information

The screenshot shows the INATrace software interface. The left sidebar has a brown background with icons for System, Companies (highlighted with a green box), Users, Settings, Value chains, and Currencies. The main content area has a white background with a header bar showing the URL [test.inatrace.org/en/companies/5/company](https://test.inatrace.org/en/companies/5/company), a user name 'Claudia (Magic Mountain Producers)', and a 'Aktualisieren' button. The main content is titled 'Edit company (Magic Mountain Producers)'. It has three sections: 'Basic information', 'Company headquarters', and 'Company description'. The 'Basic information' section contains fields for Company name (Magic Mountain Producers), Company abbreviation (empty), and Company logo (Magic Mountain\_Logo-01.png). The 'Company headquarters' section contains fields for Street address (Main Street 123), City (Mabanza), State / Province / Region (empty), Zip / Postal Code / P.O. Box (empty), and Country (Rwanda). The 'Company description' section contains an 'About company' field with the text: 'Magic Mountain Producers is a test company which produces only the finest products.'

company profile

The screenshot shows the INATrace company profile edit page. The left sidebar has 'System' selected, with 'Companies' highlighted. The main content area is divided into several sections: 'Base currency' (RWF), 'Beyco Integration' (checked for export stock orders), 'Certification' (link to add new), 'Production records' (link to add new), 'Meet the Farmers' (link to add new), and 'Social media' (links to Facebook, Instagram, Twitter, YouTube, and Other webpage URLs). At the bottom are 'Save' and 'Validation check' buttons, and a 'Validation check' button is also in the middle of the page. The right side of the image has five green arrows pointing from text descriptions to specific fields or buttons on the page.

- Currency to purchase your input products (points to the 'Base currency' field)
- Activate integration to Beyco coffee sales platform for your company (points to the 'Beyco Integration' section)
- Upload organic certificate / Fairtrade etc. (points to the 'Certification' section)
- Upload photos of production processes. (points to the 'Production records' section)
- Upload photos of farmers and quotes. (points to the 'Meet the Farmers' section)
- To validate your inputs, click on save. (points to the 'Validation check' button at the bottom)

## 8.3 Add/Edit company facility

The screenshot shows the INATrace software interface for managing company facilities. The left sidebar has 'Companies' selected. The main area shows a table of facilities and a map of Rwanda with facility locations marked.

**Company facilities (Magic Mountain Producers)**  
List of facilities  
Showing 5/5

Name	Facility type	Sellable semi-products or final products	Location	Actions
Washing station 1	Pre-processing Facility		Cell 1, Rwanda	Edit Deactivate
Parchment storage	Pre-processing Storage		Cell 1, Rwanda	Edit Deactivate
Hulling Station	Processing Facility		Cell 1, Rwanda	Edit Deactivate
Green coffee storage	Post-processing Storage	✓	Cell 1, Rwanda	Edit Deactivate
Washing Station 2	Pre-processing Facility		Cell 2, Rwanda	Edit Deactivate

**+ Add facility**

**Add a new facility to your company**

**Edit Deactivate**

**Edit facility configuration for an existing facility**

**Karte** **Satellit**

The map shows the location of facilities in Rwanda, with red pins indicating their approximate locations. The map includes labels for various towns and regions.

## New facility

### Basic information

#### Facility type\*

Select facility type

Select facility type.

### Translations

Specify name in English and add translations for all used languages.

EN DE RW ES

#### Name of facility

Enter name

Type in name of the facility.

### Location

#### Country\*

Select from codes ...

#### Village

Enter village

#### Cell

Enter cell

#### Sector

Enter sector

#### Is location publicly visible on a map?\*

Select option ...



Fill location and put pin on the map with double click.

Additional attributes

Is this a collection facility?\*

Contains sellable semi-products or final products?\*

Display 'May involve collectors'

Display 'Organic'

Display 'Women only'

Display 'Tare'

Display 'Damaged price deduction'

Display 'Damaged weight deduction'

Display 'Price determined later'

Value chains

Type value chain name: Coffee Rwanda

Contained semi-products:

Contained final products:

Only select "Yes" if this is a facility where you receive deliveries from farmers / collectors

Choose "yes" for final storage.

Optional input fields for deliveries. Select those you want to include in your "Add Delivery" interface (ONLY RELEVANT IF YOU BUY DIRECTLY FROM FARMERS)

Select the value chain for which you use this facility. (Pre-selected if your company only uses INATrace for one value chain)

Select all semi-products that can enter or leave this facility

Select all final-products that can enter or leave this facility

Check if everything is correct before saving.

**BE VERY CAREFUL WITH ALL CHANGES IN THE CONFIGURATION. ASK FOR HELP IF YOU ARE NOT SURE.**

## 8.4 Add/Edit processing actions

INATrace

System

Companies

Company Users Facilities Processing actions

Processing actions (*Magic Mountain Producers*)

List of processing actions

Showing 6/6

Name of process	Type	Input semi-product/final product	Output semi-products/final product	Actions
Weighing of coffee cherries	Processing	Unwashed coffee cherries	Pile of unwashed coffee cherries	<a href="#">Edit</a> <a href="#">Delete</a>
Wet-processing and moving to drying bed	Processing	Pile of unwashed coffee cherries	LOT of coffee on drying bed	<a href="#">Edit</a> <a href="#">Delete</a>
Packing dried coffee and transfer to parchment storage	Processing	LOT of coffee on drying bed	White bag of parchment	<a href="#">Edit</a> <a href="#">Delete</a>
Transfer parchment to hulling station	Transfer	White bag of parchment	White bag of parchment	<a href="#">Edit</a> <a href="#">Delete</a>
Hulling and sorting	Processing	White bag of parchment	Grainpro bag of green coffee	<a href="#">Edit</a> <a href="#">Delete</a>
Transfer 60kg bags to green coffee storage	Transfer	Grainpro bag of green coffee	Grainpro bag of green coffee	<a href="#">Edit</a> <a href="#">Delete</a>

+ Add processing action

Add a new processing action

Edit a processing action

### Edit processing action

**Basic information**

Value chains

Select value chain

Type value chain name

Coffee Rwanda

Type\*  
Processing

Select input semi-product\*  
Unwashed coffee cherries

**Translations**

Specify name in English and add translations for all used languages.

EN DE RW ES

Name of process  
Weighing of coffee cherries

Description  
Assessing total weight of coffee cherries received from several farmers on the same day before processing

Translation of the process name to other languages (e.g. buyer's language). **English is mandatory**

Enter name of process in selected language

- Type "**Processing**": input semi-product is different from output semi-product
- Type "**Transfer**": input semi-product is the same as output semi-product. No processing only transport to another facility

Input semi-product of this process (semi-product = unprocessed or semi-processed product)

**BE VERY CAREFUL WITH ALL CHANGES IN THE CONFIGURATION. ASK FOR HELP IF YOU ARE NOT SURE.**

**Output semi-products**

Select output semi-product.

Pile of unwashed coffee cherries

Repacked  Max output weight kg

Estimated output quantity per kg

Enter estimated output quantity

Internal lot name prefix\*

LOT

Sort order of this processing action

1

Facilities where this process starts

Add facilities where this processing action starts

Select facility

Processing Evidence Fields

Add processing evidence fields that have to be specified after this processing action has been performed.

Select evidence field

Grade  mandatory / required on quote

Processing Evidence Documents

Add processing evidence documents that have to be specified after this processing action has been performed.

Select document type

Purchase sheet

Check the box to make it mandatory for the user to fill in that input field.

Check the box in case this process includes repackaging (e.g. into new sacs).

Mandatory upload document

Public timeline label (for product journey of QR Code information) needs to be in the language of the end customer of the final product.  
**DO NOT CHANGE!**

Optionally: Define estimated output.  
User will get a warning if entered amount is outside expected range

Optionally: Define order in which system shall sort processes in the user interface

Optionally: Define facilities. This process will only show under those facilities in the user interface

Select additional input fields for further processing. Those will appear in the processing interface.

Check the box in case this process includes repackaging (e.g. into new sacs).

Select documents that the user must upload for that process.

Check the box to make it mandatory for the user to fill in that input field.

## Mandatory upload document

**BE VERY CAREFUL WITH ALL CHANGES IN THE CONFIGURATION. ASK FOR HELP IF YOU ARE NOT SURE.**



Sustainable  
Agricultural  
Supply Chains  
Initiative

## SASI – Sustainable Agricultural Supply Chains Initiative by

On behalf of



Federal Ministry  
for Economic Cooperation  
and Development