



Setup and User Guide



Version v1.0

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Table of Contents

Copyright Notice	2
Table of Contents	4
1. Introduction	6
1.1. Goals and Objectives	6
1.2. Operational Boundaries (Source: USEPA)	6
2. Prerequisites	9
2.1. Company Information	9
2.2. To Create ESG Internal/External Stakeholder Group	9
3. GHG Setup	11
3.1. GHG Setup Preferences	11
3.2. GHG Setup Tasks	12
3.3. GHG Activity Defaults	13
3.4. GHG COA Details	15
4. Item and Vendor GHG Emissions Setup	16
4.1. Item GHG Emissions Setup	16
4.2. Vendor GHG Emissions Setup	17
5. Emissions Factor Selection Hierarchy	18
5.1 Spend-Based Methodology	18
5.2 Quantity-Based Methodology	18
5.3 Life Cycle Assessment (LCA) Methodology	18
6. Set up Electricity preferences by Subsidiary or Location	20
7. Materiality Assessment	21
8. GHG Vendor Assessment	22
9. Tracking Emissions from a Purchase Order	24
10. Tracking Emissions from a Vendor Bill	25
11. Tracking Emissions from Credit Card Transactions	27
11.1 Credit Card – Charge	27
11.2 Credit Card – Credit	28
12. Tracking Emissions from Journal Entries	29
13. Employee Commuting	31
13.1 Setting Employee Commuting Defaults	31
13.2 Creating a New Employee Commuting Assessment	31
14. Tracking Emissions from Expense Reports	33

15. Emissions Workbench.....	35
16. Emissions Dashboards	37
17. ESG Goals.....	39
17.1 Goals.....	39
17.2 Sub Goal (Subsidiary Goal)	41
18. ESG Programs	43
19. Reports	45
19.1 GHG Disclosure Reports.....	45
19.2 GHG Standard Reports.....	46
20. GHG Period Close	48

1. Introduction

Your organization has significant potential to contribute to sustainability and climate action. SuiteEarth is a comprehensive ESG and Carbon Management platform that enables organizations to measure, manage and reduce their environmental impact through accurate data and insights. By leveraging SuiteEarth effectively:

- Creates a clear and structured view of GHG emissions across operations
- Provides transparency to stakeholders, including investors, customers, employees and regulators
- Enables data-driven decisions to reduce emissions and improve sustainability performance
- Supports compliance with global ESG standards and reporting frameworks
- Encourages a culture of sustainability across the organization

SuiteEarth is built in alignment with globally recognized frameworks such as the GHG Protocol, ensuring reliable and standardized emissions calculations. The platform integrates seamlessly with business processes to deliver real-time or scheduled emissions tracking and reporting.

1.1. Goals and Objectives

Before beginning your ESG and carbon management journey with SuiteEarth, define why your organization wants to measure, track and reduce emissions. Clear goals help align teams, prioritize initiatives and deliver measurable sustainability outcomes.

Consider the following business benefits when setting your ESG objectives:

- Reduced energy and operational costs
- Improved supply chain efficiency and resilience
- Stronger brand reputation and stakeholder trust
- Enhanced employee engagement and retention
- Better access to investors and sustainable financing opportunities
- Compliance with ESG reporting requirements and regulations
- Improved management of climate-related risks and opportunities
- Increased transparency across operations and subsidiaries
- Better decision-making through data-driven insights
- Progress toward long-term sustainability commitments.

1.2. Operational Boundaries (Source: USEPA)

Emissions sources of all seven major GHGs are accounted for in your Operational Boundary: CO₂, CH₄, N₂O, HFCs, PFCs, SF₆ and NF₃. Based on key characteristics of emissions sources, such as the control the organization has to affect them, the GHG Protocol organizes sources into the following three scopes:

- **Scope 1:** Emissions from sources that the organization owns or controls, like natural gas-fired furnaces or vehicle fleets. These are also called direct emissions.
- **Scope 2:** Emissions that are a consequence of the operations of the organization but occur at sources owned or controlled by another organization. These are most typically electricity, heat or steam. These are also called indirect emissions.
- **Scope 3:** Indirect emissions that are not covered in scope 1 or 2, including business travel, employee commuting, and product transport.

Scope 1: Direct Greenhouse Gas Emissions

- **Stationary Combustion:** Emissions from the burning of fossil fuels (e.g. natural gas, coal, oil) for heating, electricity or industrial processes.
- **Process Emissions:** Emissions from chemical reactions occurring in industrial processes (e.g. nitrous oxide emissions from fertilizer production).
- **Mobile Combustion:** Emissions from vehicles, such as cars and trucks and other mobile sources (e.g. trucks, ships and airplanes).
- **Fugitive Emissions:** Emissions from unintentional leaks of planet-warming gasses or liquids (e.g. leaks from refrigeration equipment).
- **Agriculture Emissions:** Emissions from livestock (e.g. manure management and enteric fermentation) and from crop cultivation.

Scope 2: Indirect Greenhouse Gas Emissions

- **Purchased Energy:** Emissions from the generation of electricity, heat or steam that is purchased by an organization and used in its operations (e.g. electricity purchased from the grid).

Scope 3: Other Indirect Greenhouse Gas Emissions

- **Purchased Goods and Services:** Emissions from the extraction, production, storage and delivery of goods and services purchased by an organization (e.g. Emissions from material suppliers).
- **Capital Goods:** Emissions from the extraction, production storage and delivery of capital assets purchased by an organization (e.g. Emissions from asset suppliers).
- **Fuel and Energy Related Activities:** Emissions from the extraction, production and distribution of fuel and energy that is used by an organization. These Emissions occur upstream from the purchase of the fuel and energy (e.g. emissions from oil refining).
- **Upstream Transportation and Distribution:** Emissions from the transportation and distribution of goods and materials used by an organization (e.g. Emissions from transporting raw materials to a factory).

- **Waste Generated in Operations:** Emissions from the treatment and disposal of waste generated by an organization's operations (e.g. Emissions from trash that is picked up on site and delivered to a landfill).
- **Business Travel:** Emissions from travel related to business activities (e.g. Emissions from air travel, car rentals or hotel stays).
- **Employee Commuting:** Emissions from employees commuting to and from work (e.g. Emissions from driving a car to work or energy consumed while working from home).
- **Upstream Leased Assets:** Emissions from the extraction, production storage and delivery of assets that an organization leases rather than owns (e.g. Emissions from producing a leased car).
- **Downstream Transportation and Distribution:** Emissions from the transportation and distribution of products after they are sold (e.g. Emissions from delivering finished products to customers).
- **Franchises:** Emissions from franchise operations that are not directly owned or controlled by an organization (e.g. Emissions from a franchised fast food restaurant).
- **Investments:** Emissions from investments in other companies or organizations (e.g. Emissions from an organization's portfolio of investments in all types of companies).
- **Water:** Emissions from the consumption and treatment of water within an organization's facilities (e.g. water consumption, water treatment).

2. Prerequisites

1. Setup Company Profile
2. Setup Subsidiaries
3. Setup Accounting Periods
4. Chart of Accounts
5. To Create a Internal/External Stakeholder Group
6. Prepare your Base Unit conventions (e.g., kg, L, kWh) and Conversion Rates.

2.1. Company Information

1. Login as **Administrator**. Go to **Setup > Company > Company Information**.
2. Select the **Emissions Schedule** to determine how emissions are processed:
 - **Real-time** – Emissions are calculated instantly and all GHG parameters remain visible in the UI.
 - **Daily / Weekly / Monthly** – Emissions are processed through background batch scripts.
 - When using Daily, Weekly or Monthly schedules, GHG parameter fields are hidden on the UI and emissions are calculated during the nightly processing run.
 - Any transactions with missing or incomplete data are routed to the **Incomplete** tab in the Emissions Workbench.
3. Select the **GHG Standard** followed by the company to ensure alignment with reporting frameworks
4. Click Save.

2.2. To Create ESG Internal/External Stakeholder Group

1. Go to **Lists >> Relationship >> Groups**
2. Click on New Group
3. Select **Dynamic Group** to enable automatic stakeholder assignment through saved searches.
4. Based on the stakeholder type, select the appropriate group category:
 - **Contacts** for External Stakeholders such as vendors, customers, investors, and other external parties.
 - **Employees** for Internal Stakeholders such as employees and other internal parties.
5. Click **Continue**.
6. Enter a name for the stakeholder group.
7. Select the appropriate saved search.
 - Saved searches are preconfigured to identify and assign stakeholders that belong to a specific group.

- The selected saved search automatically determines which contacts or employees are included in the group.
8. Save the stakeholder group.

3. GHG Setup

3.1. GHG Setup Preferences

Preferences define reporting boundaries, ownership details and applicable GHG standards for each subsidiary.

1. Login as **Administrator**. Go to **SuiteEarth > Setup > GHG Setup Preferences**.
2. Select **Create New Preferences** to define a new GHG configuration.
3. Enter the **Subsidiary** for which the preferences apply.
4. Enter the **Effective Date** from which the preferences become active.
5. Select the **GHG Standards**, such as **DEFRA** or **USEPA**.
6. Select the **Boundary Type** used for ESG reporting.
7. Enter the **Ownership Percentage** representing the applicable equity share.
8. Select the **Control Type**, choosing between **Financial** or **Operational** control.
9. Select **Save Preference** to create the GHG setup record. The saved preferences determine how emissions data is interpreted and reported for the selected subsidiary.

Boundary Type, Ownership Percentage and Control Type with the values you mentioned:

Boundary Type	Ownership Percentage	Control Type	Description
Equity Share	Enter % of ownership (e.g., 40%)	Not Applicable	Emissions are accounted for in proportion to the equity share held in the entity.
Control Approach (Operational/Financial)	100% if control applies	Owned	Entity or asset is fully owned and therefore 100% of emissions are reported.

Control Approach (Operational/Financial)	As per lease agreement	Leased	Emissions are reported based on operational responsibility for leased assets.
Control Approach (Operational/Financial)	Share based on agreement	JV (Joint Venture)	Emissions are reported according to the terms of the joint venture agreement.
Control Approach (Operational/Financial)	Typically, 0%	Supplier-Controlled	Emissions are not directly controlled; they fall under Scope 3 (supply chain) reporting.

3.2. GHG Setup Tasks

Setup tasks consolidate all GHG configuration details (subsidiaries, UOMs, vendors, etc.) into one place.

1. Login as **Administrator**. Go to **SuiteEarth > Setup > GHG Setup Tasks**.
2. Select the relevant **Subsidiary**.
3. Work through the available tabs and complete/update required data:
 - **Subsidiary Details:** Setup electricity preferences
 - **Location Details:** Setup electricity preferences
 - **Item Details:** Emissions can be mapped from the Item Record or this screen using defaults. If linked to multiple standards or subsidiaries, Activity Type and Subtype remain blank and mapping is taken from the Activity Defaults Table. Refer to [Section 4.1](#).
 - **Vendor Details:** Emissions can be mapped from the Vendor Record or directly through this screen using default configurations. If a vendor is linked to multiple standards or subsidiaries, the Activity Type and Subtype fields remain blank and the mapping is derived from the Activity Defaults Table. Vendor-specific emissions preferences and default configurations can also be maintained here. Refer to [Section 4.2](#).
 - **Expense Category Details:** Emissions can be mapped from the Expense Category record or through GHG Setup Tasks using defaults. When an expense category is linked to multiple standards or subsidiaries, the Activity Type and Subtype fields remain blank and the system applies mapping from the Activity Defaults Table.
 - **UOM Details:** For each **Business UOM**, select the corresponding **GHG UOM**.
 - Ensure mapping is completed only within the same unit family. Examples include:
 - Each / Count → Each / Count
 - Volume → Volume
 - Weight → Weight
 - Distance → Distance
 - Time → Time
 - Energy → Energy

- For Each / Count units, first create a base unit and map it to GHG Each with a conversion factor of 1. Review additional unit conversions before saving.
- These mappings are used in item-based and expense-based emissions calculations.
- If UOM mapping is not maintained, item transaction emissions may not calculate correctly, while standard expense units may continue to use default GHG UOM conversions.
- Click **Save**. The following screenshot shows the GHG Units of Measures Form. The following screenshot shows the GHG UOMs link.

GHG Setup Tasks More

Subsidiary: --All Subsidiaries--

Subsidiary Details | Location Details | Item Details | Vendor Details | **UOM Details** | GHG Base Year Setup

GHG Units of Measure (3) •

Export UOMs | Save UOM Details

Edit	Business UOM Type	Business UOM	GHG UOMs	GHG UOM Type	Conversion Rate
☐	CTN	CTN	Each	Each	1
☐	EACH	EACH	Each	Each	1
☐	PACK	PACK	Each	Each	1

- **GHG Base Year Setup:** Maps emissions using base year defaults.

4. Click **Submit** to apply all changes. The following screenshot shows the GHG Setup Tasks.

3.3. GHG Activity Defaults

1. Log in as an **Administrator** and navigate to **SuiteEarth > Setup > GHG Activity Configuration Defaults**.
2. Select the required **GHG Standard** from the **GHG Standards** field. The selected standard determines the default activity mappings and methodology preferences used for emissions calculations.
3. Use the **Configuration Defaults** tab to configure default activity mappings:
 - Click **Edit**.
 - For each activity, select the appropriate **Activity Type** and **Activity Subtype**.
 - These mappings act as fallback values when activity mappings are not configured at the item, expense category, or transaction level.
 - Click **Save** to store the configuration.
4. Open the **GHG Methodology Configuration** tab to review or configure emissions calculation methodologies for Scope 3 categories.
5. For each Scope 3 category, define the preferred calculation methodology:
 - **Preference 1** – Primary methodology used for emissions calculations.
 - **Preference 2** – Secondary methodology used when the primary methodology is unavailable.

- Available methodologies may include **Spend-Based** and **Activity-Based** calculations, depending on the category.
- Review the **LCA Enabled** setting to identify categories that support Life Cycle Assessment (LCA) calculations.
 - Click **View History** to review methodology changes and maintain an audit trail of configuration updates.

Notes List:

Note 1: Preference 1, Preference 2, and LCA Enabled settings are applicable only to the following Scope 3 categories:

- Capital Goods
- Purchased Goods
- Purchased Services

Note 2: For these categories, the system uses the configured methodology preference order to determine whether emissions are calculated using the Activity-Based or Spend-Based approach.

Note 3: The **LCA Enabled** option allows the system to use Life Cycle Assessment (LCA)-based emissions factors, where applicable, for improved calculation accuracy.

Note 4: For all other ESG activities, the system uses the standard emissions calculation process. Methodology preferences and LCA settings are not applicable.

- Save** the record to apply the selected methodology preferences and activity default mappings.

GHG Standards	Activity Name	UOM Type	Activity Type	Activity Subtype
USEPA	Waste Treatment Inside	Weight		
USEPA	Waste Treatment Outside	Weight		
DEFRA	Fuel Burnts	Weight	Solid Fuels	Coal (Domestic) Combustion
DEFRA	Fuel Burnts	Volume	Biofuels - Volume	Biodiesel HVO Combustion - Volume
USEPA	Fuel Burnts	Volume	Biomass Fuels - Liquid	Ethanol (100%)
USEPA	Fuel Burnts	Weight	Other Fuels - Solid	Petroleum Coke (Solid)
USEPA	Business Travel	Length	Business Travel - Air	Air Travel - Long Haul (gte 2500 miles)
DEFRA	Business Travel	Length		
NGA	Business Travel	Length		
DEFRA	Business Travel	Each		
USEPA	Business Travel	Each		
DEFRA	Owned Vehicles	Length		
USEPA	New Equipment Installation	Each	Stand-alone Commercial Applications	Stand-alone Commercial Applications-c-C4F8

GHG Activity Configuration Defaults

Edit

GHG Standards

Configuration Defaults

GHG Methodology Configuration

Scope 3 Category	Preference 1	Preference 2	LCA Enabled	History
Capital Goods	Spend	Activity	Yes	View History
Purchased Goods	Activity	Spend	Yes	View History
Purchased Services	Spend	Activity		View History
Capital Goods	Activity			View History
Purchased Goods	Spend		Yes	View History
Purchased Services	Spend	Activity		View History

Edit

3.4. GHG COA Details

1. Login as **Administrator**. Go to **SuiteEarth > Setup > GHG COA Details**.
2. The GHG Impact Accounts List opens with search and filter options.
3. Use **Search Accounts** or the **GHG Impact** filter to locate the required account. Select **Edit**, then enable or update the relevant GHG Impact settings for the account. This ensures eligible accounts are considered for emissions calculations.
4. **Save** the record to store the updated account configuration.

GHG Impact Accounts List

Next >

Search Accounts (by ID or Name)

GHG Impact

All

Page Info
Showing 1 - 25 of 37 records | Page 1 of 2

#	Actions	Account ID	Account Name	GHG Impact
1	View Edit	1000	Cheque Account	
2	View Edit	3000	Retained Earnings	
3	View Edit	3200	Opening Balance	
4	View Edit	4000	Sales	
5	View Edit	6000	Expenses	
6	View Edit	4050	Shipping and Handling	
7	View Edit	3035	Cumulative Translation Adjustment	
8	View Edit	110	Unapproved Customer Payments	
9	View Edit	111	Accounts Payable	
10	View Edit	112	Accrued Purchases	
11	View Edit	113	Return Authorizations	
12	View Edit	114	Estimates	
13	View Edit	115	Purchases	

4. Item and Vendor GHG Emissions Setup

4.1. Item GHG Emissions Setup

1. Login as Sustainability Manager. Go to **Lists > Accounting > Item**. Open the required Item Record.
2. Navigate to the **GHG Emissions** tab within the item record.
3. Select the applicable **GHG Activity** for the item. This defines the emissions category associated with the item, such as Purchased Goods, Capital Goods, Purchased Services, or other relevant activities.
4. Based on the selected GHG Activity, the system displays the related **GHG UOM Type** and determines whether the item uses a **Spend-Based** or **Quantity-Based** methodology.
5. For activities configured to use the **Spend-Based** methodology, use the **GHG Spend Setup** section to map emissions factors for the required ESG Standards (such as USEPA, DEFRA, or NGA).
6. Navigate to the **Vendor-Item** subtab and create vendor-item emissions factor mappings for **Capital Goods**, **Purchased Goods**, and **Purchased Services**. Use this subtab when emissions factors differ by vendor or when vendors provide quantity-based emissions values for these spend-based Scope 3 categories.
7. Use the Effective Date and End Date fields to manage factor revisions over time.
8. During transaction processing for Capital Goods, Purchased Goods, and Purchased Services, the system retrieves emissions factors based on the methodology preferences configured in **GHG Methodology Configuration** and the factor records that are active for the transaction date.
9. For activities configured to use the **Quantity-Based** methodology, use the **GHG Quantity Based Setup** section to map the required ESG Standard, Activity Type, and Activity Subtype. These mappings are used to derive emissions factors during transaction processing.
10. For all other quantity-based ESG activities, the system uses the mappings configured in the **GHG Quantity Based Setup** section to calculate emissions.
11. The system validates methodology consistency. If a Spend-Based activity is selected, Quantity-Based Setup cannot be added, and vice versa.
12. The system also validates ESG Standard applicability. If a selected standard is not configured for the relevant subsidiary, the system prevents invalid mapping.
13. Review all configurations and save the item record. Once saved, the configured mappings and emissions factors are automatically applied during supported transactions.

The screenshot displays the 'GHG Emissions' setup page for an item. The 'GHG Activity' is set to 'Capital Goods'. The 'GHG UOM Type' is displayed. The 'GHG Spend Setup' section is active, showing a table for mapping emissions factors. The table has columns for 'GHG Standards', 'GHG Business Category Code', 'GHG Business Code Source Type', 'GHG Emissions Factor', 'GHG Emissions Factor UOM', and 'Remove'. A row is visible with 'USEPA' under 'GHG Standards' and a 'Remove' button under 'Remove'.

4.2. Vendor GHG Emissions Setup

1. Login as Sustainability Manager. Go to **Lists > Accounting > Item**. Open the required Vendor Record.
2. Navigate to the **GHG Emissions** tab within the vendor record.
3. Select or review the applicable **GHG Activity** for the vendor, such as **Purchased Goods, Capital Goods, Purchased Services** or other relevant procurement-related activities and click on **Save**.
4. Use the **GHG Spend Based Setup** section to maintain vendor-level emissions factors used for spend-based emissions calculations.
5. Click **New GHG Vendor Spend Setup** to create a new vendor emissions factor mapping.
6. Select the applicable **GHG Standard** (such as USEPA, DEFRA or NGA), then enter or map the required **GHG Business Category Code, Business Code Source Type** and related emissions factor details.
7. Enter the **GHG Emissions Factor** and corresponding **GHG Emissions Factor UOM** to define the factor used for vendor spend calculations.
8. Use the **GHG Vendor Custom Emissions Factor** section to maintain vendor-specific custom factors where supplier-provided or contract-specific emissions data is available.
9. Use the **GHG Direct Line Emissions** section where emissions need to be directly assigned to the vendor outside standard spend methodology.
10. Maintain **Effective Date** and **End Date** values where applicable to preserve historical records and support future updates. To revise an existing factor, close the current record with an End Date and create a new record with the updated Effective Date.
11. The system validates GHG Standard applicability based on configured subsidiaries and prevents invalid mappings where standards are not relevant.
12. Review all configurations and save the vendor record. Once saved, the mapped factors are automatically applied during supported purchasing transactions such as Purchase Orders, Vendor Bills and related procurement records.

Subsidiaries Relationships Communication Address Marketing Financial Preferences System Information Access Custom Time Tracking **GHG Emissions** AI Rating

GHG Activity
Purchased Goods

CEF History

GHG Spend Based Setup GHG Vendor Custom Emissions Factor GHG Direct line Emissions

View
Default View

New GHG Vendor Spend Setup Customize View

#	GHG Standards	GHG Business Category Code	GHG Business Code Source Type	GHG Emissions Factor	GHG Emissions Factor UOM
No records to show.					

5. Emissions Factor Selection Hierarchy

SuiteEarth applies emissions factors based on a predefined hierarchy during emissions calculations. The system evaluates the available configurations in sequence and selects the most relevant emissions factor.

5.1 Spend-Based Methodology

For spend-based calculations, emissions factors are selected in the following order:

1. Vendor + Item specific emissions factor
2. Regular spend item emissions factor
3. Vendor Custom Emissions Factor
4. Vendor NAIC ID - based emissions factor
5. Subsidiary emissions factor configured in ESG Setup Preferences

Note: For Spend, expense-based transactions the hierarchy starts from the Regular spend emissions factor level, since Vendor + Item specific emissions factors are applicable only for item-based transactions.

5.2 Quantity-Based Methodology

For **Scope 1** and **Scope 3** calculations, the system uses the following hierarchy:

1. Item Quantity - based setup
2. Activity Defaults configuration

For **Scope 2 (Electricity Grid)** calculations, the system uses the following hierarchy:

1. Item or Expense electricity mapping
2. Location electricity preferences
3. Subsidiary electricity preferences
4. Activity Defaults configuration

This hierarchy ensures that the most specific and relevant emissions factor is applied during transaction processing.



Note: If no valid emissions factor is identified through the configured hierarchy, the transaction is routed to the **Incomplete Transactions** tab in the Emissions Workbench for further review and completion.

5.3 Life Cycle Assessment (LCA) Methodology

For organizations that have enabled the LCA module, SuiteEarth prioritizes LCA-based emissions data during emissions calculations. When valid LCA emissions data is available, it is selected before the standard emissions factor hierarchy. If LCA data is unavailable, the system automatically falls back to the applicable Spend-Based or Quantity-Based methodology.

To upload an LCA document for an item,

1. Open the **Item** record and navigate to the **LCA Setup** tab.

2. Click **Import**. The **LCA Configuration** page opens.
3. Select the required **Country** and enter the **Effective Date**.
4. Click **Save & Continue**.

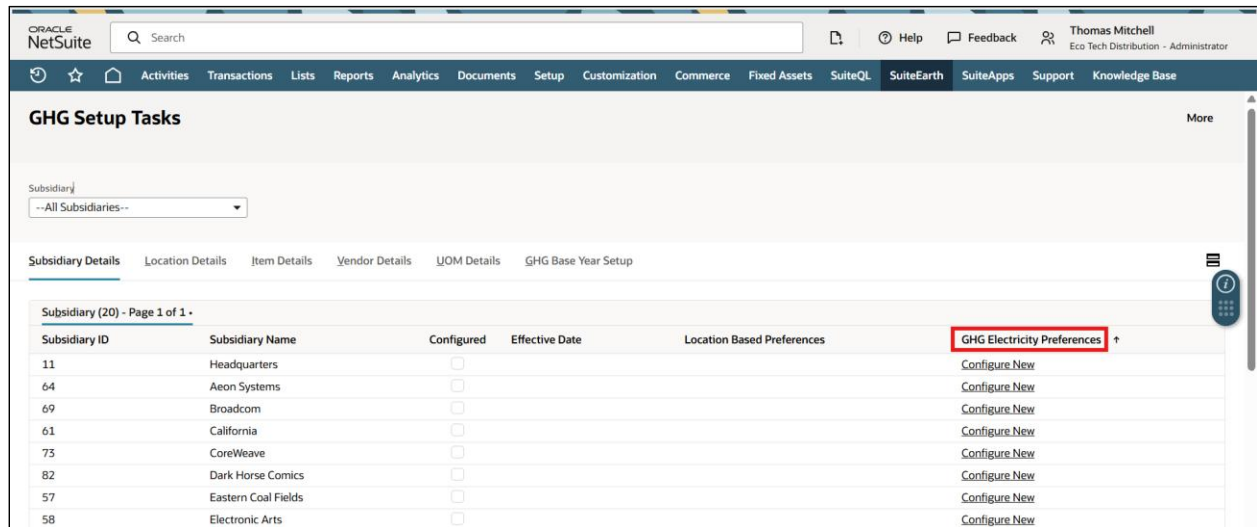
5. Click **Upload** and select the LCA data file in **CSV (.csv)** format.
6. Click **Save & Continue** to upload and save the LCA record.

7. The uploaded LCA record becomes available under the **LCA Product Info** section of the **LCA Setup** tab.

Note: After uploading one or more LCA records, use **Add/Update Default LCA** to assign the default LCA for the item. Select the appropriate LCA record and save the configuration. The designated record will be used as the item's default LCA in subsequent emissions calculations and reporting.

6. Set up Electricity preferences by Subsidiary or Location

1. Login as **Administrator**. Go to **SuiteEarth > GHG Setup Tasks > GHG Electricity Preferences**
2. The form opens with **Location-Based** electricity preference options. Select the relevant settings and save the record to apply the changes.
3. The selected preferences are saved in SuiteEarth and applied automatically during electricity transactions.



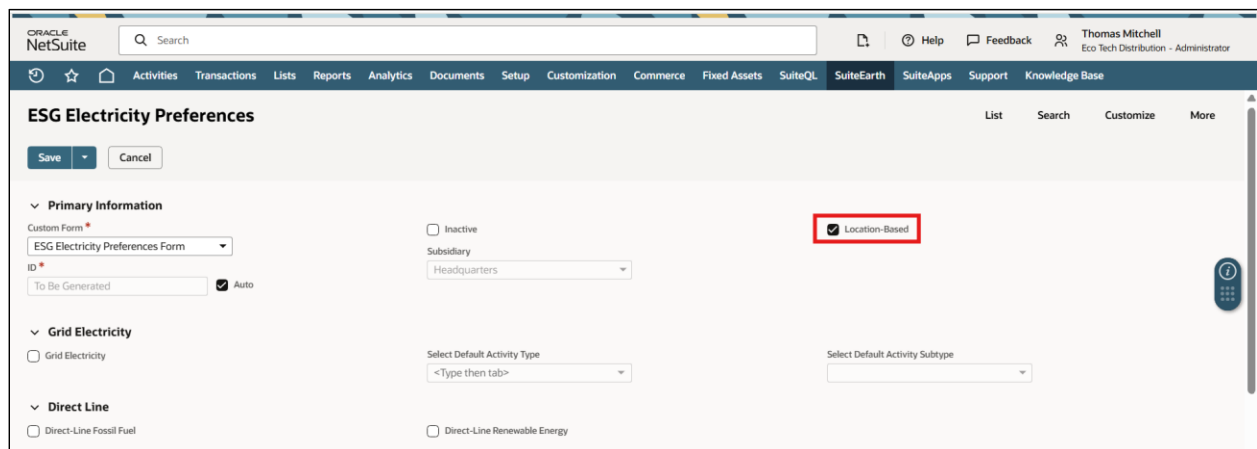
GHG Setup Tasks

Subsidiary: --All Subsidiaries--

Subsidiary Details | Location Details | Item Details | Vendor Details | UOM Details | GHG Base Year Setup

Subsidiary (20) - Page 1 of 1 -

Subsidiary ID	Subsidiary Name	Configured	Effective Date	Location Based Preferences	GHG Electricity Preferences
11	Headquarters	☐			Configure New
64	Aeon Systems	☐			Configure New
69	Broadcom	☐			Configure New
61	California	☐			Configure New
73	CoreWeave	☐			Configure New
82	Dark Horse Comics	☐			Configure New
57	Eastern Coal Fields	☐			Configure New
58	Electronic Arts	☐			Configure New



ESG Electricity Preferences

Save Cancel

Primary Information

Custom Form *
ESG Electricity Preferences Form

ID *
To Be Generated ☒ Auto

☐ Inactive
Subsidiary
Headquarters

☒ Location-Based

Grid Electricity

☐ Grid Electricity

Select Default Activity Type
<Type then tab>

Select Default Activity Subtype

Direct Line

☐ Direct-Line Fossil Fuel ☐ Direct-Line Renewable Energy

7. Materiality Assessment

1. Login as **Sustainability Manager**. Go to **Manage > Access & Improve > ESG Materiality Assessment**.
2. A form opens displaying the list of assessments.
3. To create a new assessment, select **New Materiality Assessment**.
4. A new form opens. Enter the required details, select the material topics and Internal/External stakeholder and save the record. Refer to [Section 2.2](#). To Create ESG Internal/External Stakeholder Group

The screenshot shows the 'ESG Materiality Assessment' form in Oracle NetSuite. The form has a header with 'ORACLE NetSuite' and a search bar. Below the header is a navigation bar with tabs: Activities, Measure, Manage, Report, Transactions, List, Analytics, Customization, Documents, Setup, SuiteApps, Support, and Knowledge Base. The main content area is titled 'ESG Materiality Assessment' and contains two sections: 'Primary Information' and 'Stakeholders Impact'. The 'Primary Information' section includes fields for Period (FY 2026), Name, Status (Not Started), Subsidiary, Location, and Material Topic (Energy consumption and efficiency). The 'Stakeholders Impact' section includes fields for Internal Stakeholders Group (Employee Group, Business Group) and External Stakeholders Group (Vendor Group, Customer Group). There are 'Submit' and 'Cancel' buttons at the top left of the form.

5. An external email is sent by the system to the relevant stakeholders, requesting their ratings.
6. After external forms are submitted with rating information, SuiteEarth automatically calculates the overall rating and displays it in the form.

The screenshot shows the 'Details' tab of the ESG Materiality Assessment form. It displays a table with the following data:

Material Topic	Stakeholder Score	Stakeholder Rating	Business Score	Business Rating	Over Score (Weighted Avg)	Over Rating	Result	Recommendations
Talent acquisition and retention	9	Medium	7	High	7.80			Communicate more, build awareness

Below the table is a text input field and a set of buttons: Add, Cancel, Insert, and Remove. At the bottom of the form are 'Submit' and 'Cancel' buttons.

7. After all stakeholders submit their responses, the overall rating is displayed in the form.

8. GHG Vendor Assessment

1. Log in as a Sustainability Manager and navigate to **SuiteEarth > Assess & Improve > ESG Supplier Assessment**.
2. Click **Create ESG Supplier Assessment**.
3. In the **Primary Information** section, enter the following details:
 - **Name** – Enter a unique name for the assessment.
 - **Period** – Select the reporting period for the assessment.
 - **Industry** – Select the industry template that contains the applicable assessment questions.
 - **Owner** – Displays the user responsible for the assessment.
4. Review the **Total Questions** field, which displays the number of questions available for the selected industry template.
5. In the assessment section, review the ESG questions organized under the following tabs:
 - All
 - Environment
 - Social
 - Governance
6. For each question:
 - Review the **Question** and **Score Requirement**.
 - Select or verify the applicable **ESG Classification**.
 - Enter the vendor's response in the **Answer** field.
 - Select the **Task** checkbox if follow-up action is required.
 - Record the applicable **Score** based on the response received.
7. Repeat the process until all required assessment questions are completed.
8. Click **Save** to create the assessment.

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ActivitiesMeasureManageReportTransactionsListAnalyticsCustomizationDocumentsSetupSuiteAppsSupportKnowledge Base

ESG Supplier Assessment

More

SaveBack

▼ Primary Information

Name *

Period *

FY 2026

Total Questions

45

Select Industry *

- New -

Pharmaceutical

Fertilizers Industry

Owner *

Thomas Mitchell

AllEnvironmentSocialGovernance

All Questions -

Question	ESG Classifications	Answer	Score Requirement +	Task	Score
Does your company disclose Scope 1 and Scope 2 greenhouse gas emissions?	Environment (E)		State whether the disclosure is verified?	☐	
Does your company disclose Scope 3 emissions from supply chain and logistics?	Environment (E)		State whether the disclosure is verified?	☐	
Does your company have a public target to reduce GHG emissions?	Environment (E)		Confirm if they are publicly disclosed?	☐	
Does your company have a climate transition or net-zero roadmap?	Environment (E)		Confirm if it is published and SBTi-aligned?	☐	

Note: SuiteEarth supports **AI Smart Vendor Rating**, which analyzes vendor assessment responses and ESG-related information to generate an AI-assisted sustainability rating. This rating helps organizations quickly evaluate vendor ESG performance, identify potential sustainability risks, and prioritize supplier engagement and improvement initiatives.

ESG Rating

SubmitBackAI Rating

▼ Primary Information

Vendor Name

AI Test Vendor

▼ Set Rating

☐ Manual Rating

☒ Smart Rating

▼ Environment

Supplier Assessment 2026

Current Grade: B

Smart Rating

B

Powered By SuiteEarth AI
Smart Rating ESG Score
56

Info ⓘ

Rating Guide

A+

Lowest emission levels. Vendor is exemplary.

A

Low emission levels. Vendor is good.

B

Moderate emission levels.

C

Highest emission levels. Needs improvement.

9. Tracking Emissions from a Purchase Order

1. Login as **ESG A/P Clerk**. Go to **Vendors > Purchases > Enter Purchase Order**.
2. Enter the basic details, including vendor information.
3. Select the items to be purchased at the line level.
4. For each line item, the mapped GHG activity, calculation method and estimated emissions value is displayed.
5. Select **View Emissions Data** to access detailed information for the selected item.
6. The **GHG Memo** field displays the source of the emissions data, which can be from the vendor, the item or the default activity configuration.
7. Open the **GHG Emissions** tab to view the overall estimated emissions, aggregated from all line items.
8. Save the Purchase Order. After saving, the transaction proceeds through the standard workflow, including Item **Receipt** and **Bill Creation**.

Oracle NetSuite | Search | Help | Feedback | Thomas Mitchell | SUITEEARTH TECHNOLOGIES PRIVATE LIMITED - ESG A/P Clerk

Activities | Customers | Vendors | Financial | Reports | Analytics | Documents | Setup | SuiteApps | Support

Purchase Order | List | Search | More

Save | Cancel | Auto Fill | Actions

Primary Information

Custom Form *
ESG Purchase Order

Vendor *
Johnson & Johnson

ESG Rating
A

Date *
24/4/2026

PO #

To Be Generated

Memo

Classification

Subsidiary
SuiteEarth C1

Location

Currency *
US Dollar

Summary

Subtotal	0.00
Tax Total	0.00
Total	0.00

10. Tracking Emissions from a Vendor Bill

1. Login as **ESG A/P Clerk**. Go to **Vendors > Purchases > Enter Bills**.
2. Enter the basic details, including vendor information.

Note: If the bill is routed from a Purchase Order, this information is populated automatically.

The screenshot shows the Oracle NetSuite 'Bill' form. The top navigation bar includes 'Activities', 'Customers', 'Vendors', 'Financial', 'Reports', 'Analytics', 'Documents', 'Setup', 'SuiteApps', and 'Support'. The user is logged in as 'Thomas Mitchell' (SUITEEARTH TECHNOLOGIES PRIVATE LIMITED - ESG A/P Clerk). The form is titled 'Bill' and has a search bar. Below the title are buttons for 'Save', 'Cancel', 'Auto Fill', 'Recalc', and 'Actions'. The form is divided into several sections:

- Primary Information:**
 - Custom Form: ESG Vendor Bill
 - Transaction Number: To Be Generated
 - Vendor: Johnson & Johnson
 - ESG Rating: A
 - VAT Registration: (empty)
 - Tax: 0.00
 - Disc. Amt: (empty)
 - Disc. Date: (empty)
 - Payment Hold: (unchecked)
 - Due Date: 24/4/2026
 - Date: 24/4/2026
 - Posting Period: Apr 2026
 - Memo: (empty)
 - Approval Status: Approved
- Classification:**
 - Subsidiary: SuiteEarth C1
 - Location: (empty)
 - Currency: US Dollar
 - Exchange Rate: 1.00

3. Add the line items if creating a standalone vendor bill or review the line items if the bill is routed from a Purchase Order.
4. For each line item, the mapped GHG activity, calculation method and actual emissions value are displayed.
5. Select **View Emissions Data** to view and edit the emissions configuration details for the selected item.
6. The **GHG Memo** field shows the emissions data source, derived from the vendor, the item or the default activity configuration.
7. Open the **GHG Emissions** tab to view the actual emissions, aggregated from all line items.
8. Save the Vendor Bill. After the bill is saved and approved, the workflow continues to the **Emissions Workbench** for further approvals.

Note: In Vendor Bills, expenses can also be added. Actual emissions values are then calculated by providing minimal data in the **View Emissions Data** popup.

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ActivitiesCustomersVendorsPayroll and HRFinancialReportsAnalyticsDocumentsSetupFixed AssetsSuiteAppsSupportKnowledge Base

Location
Alaska

☐ Intercompany Transaction☐ Intercompany Transaction (2)

Expenses and ItemsBillingRelationshipsCommunicationCustomApprovalsGHG Emissions

☐ Landed Cost per Line

Expenses 600.00Items 0.00

Clear All Lines

nount *	Memo	Department	Class	Locations	Customer	Billable	Amortization Schedule	Amortization Start	Amortization End	Residual	GHG Impact	GHG Calculation Method	GHG Activity	GHG Emissions Value (MtCO2e)	Related Asset	View Emissions Data
600.00											Yes	Quantity	Business Travel	1.64395		

11. Tracking Emissions from Credit Card Transactions

Credit Card Transactions provide two transaction types:

11.1 Charge - For recording expenditures.

11.2 Credits - For recording refunds or reversals of previously entered charges.

11.1 Credit Card – Charge

1. Login as **ESG A/P Clerk**. Go to **Vendors > Purchases > Use Credit Card** and select Charge.
2. Verify the custom form and enter the Reference #, Credit Card Account, Amount, Currency, Exchange Rate, Date, Posting Period and Memo if needed.
3. Select the Vendor and Subsidiary and enter the Fiscal Year if required.
4. Open the **Expenses & Items** tab and add each expense line by selecting the Expense Account and entering the Amount and Description.
5. After each line is added, the mapped GHG Activity, Calculation Method and Estimated Emissions Value are displayed automatically.

The screenshot shows the Oracle NetSuite 'Credit Card Transaction' form. At the top, there's a navigation bar with tabs like Activities, Customers, Vendors, Payroll and HR, Financial, Reports, Analytics, Documents, Setup, Fixed Assets, SuiteApps, Support, and Knowledge Base. The 'Financial' tab is active. Below the navigation bar, the 'Credit Card Transaction' form is displayed. The 'Charge' radio button is selected and highlighted with a red box. The form is divided into two main sections: 'Primary Information' and 'Classification'. The 'Primary Information' section includes fields for Custom Form (ESG Credit Card Charge), Transaction Number (To Be Generated), Vendor (<Type then tab>), Reference #, Account, Amount, Currency (USD), Exchange Rate (1.00), Date (4/24/2026), Posting Period, and Memo. The 'Classification' section includes a Subsidiary dropdown, Balance, and checkboxes for Intercompany Transaction and Intercompany Transaction (2). A 'Liara AI Assistant' button is visible in the bottom right corner.

6. Select **View Emissions Data** on any line to review or adjust emissions details. The popup shows emissions factor source, activity type/subtype and the GHG Memo indicating whether the source is vendor, item or default activity configuration.
7. Save the emissions details in the popup and return to the main form.
8. Open the **GHG Emissions** tab if needed and review the GHG Emissions Value and ownership percentage.

This screenshot shows the 'GHG Emissions' tab in the NetSuite interface. The 'ESG Standards' dropdown is set to 'None'. The 'GHG Emissions Value (MtCO₂e)' field contains '0'. The 'Ownership %' field is empty. At the bottom, there are buttons for 'Save', 'Cancel', 'Auto Fill', 'Recalc', and 'Actions'.

9. **Save** the Credit Card Charge. The transaction is recorded, available for reconciliation and flows into Emissions Workbench for review and approval.

11.2 Credit Card – Credit

1. Login as **ESG A/P Clerk**. Go to **Vendors > Purchases > Use Credit Card** and select Credit.
2. Enter the Reference #, Credit Card Account, Amount, Currency, Exchange Rate, Date, Posting Period, Vendor, Subsidiary and Memo as applicable.

This screenshot shows the 'Credit Card Transaction' form in NetSuite. The 'Charge' radio button is selected, and the 'Credit' radio button is highlighted with a red box. The 'Primary Information' section includes fields for 'Custom Form' (set to 'ESG Credit Card Charge'), 'Reference #', 'Account', 'Amount', 'Currency' (set to 'USD'), 'Exchange Rate' (set to '1.00'), 'Date' (set to '4/24/2026'), 'Posting Period', and 'Memo'. The 'Classification' section includes a 'Subsidiary' dropdown. At the bottom, there are checkboxes for 'Intercompany Transaction' and 'Intercompany Transaction (2)'. Buttons for 'Save', 'Cancel', 'Auto Fill', 'Recalc', and 'Actions' are at the top left.

3. In the **Expenses & Items** tab, add the credit lines using the matching expense accounts from the original charge where possible.
4. For each credit line, the system calculates the emissions reduction using the same mapping logic as a normal charge.
5. Select **View Emissions Data** to review the adjusted emissions values and emissions source information.

This screenshot shows the 'GHG Emissions' tab in the NetSuite interface, identical to the first screenshot. The 'ESG Standards' dropdown is set to 'None'. The 'GHG Emissions Value (MtCO₂e)' field contains '0'. The 'Ownership %' field is empty. At the bottom, there are buttons for 'Save', 'Cancel', 'Auto Fill', 'Recalc', and 'Actions'.

6. Save the emissions details in the popup and return to the form.
7. **Save** the Credit. The refund or reversal is recorded and the emissions adjustment is applied.

12. Tracking Emissions from Journal Entries

1. Login as **ESG A/P Clerk**. Go to **Financial > Other > Make Journal Entries**.
2. Verify the **Custom Form** is set to *ESG Journal Entry* or the appropriate configured form.
3. Enter the header details, including **Date**, **Posting Period**, **Currency** and **Exchange Rate**.
4. Select the **Subsidiary** in the Classification section.

5. In the **Lines** section, add a new line by selecting the **Account** to be debited or credited.
6. Enter the **Debit** or **Credit** amount for the line. Both values cannot be entered on the same line. Balance the entry across multiple lines as required.
7. Enter additional classifications such as **Department**, **Class**, **Location** and **Schedule** if applicable.
8. Review the emissions-related fields displayed on the line:
 - GHG Impact
 - GHG Expense Category
 - GHG Calculation Method
 - GHG Activity
 - GHG Emissions Value (MtCO₂e)



Note: The GHG Impact displayed on the line is dependent on the selected account type. Only accounts configured for GHG relevance will generate emissions values. Accounts without GHG relevance will not produce any GHG Impact or emissions.

9. Select **View Emissions Data** to review or update the emissions inputs linked to that line. This window displays emissions factors, activity type/subtype, source details and calculated emissions.

The screenshot displays the 'GHG Emissions' section of the SuiteEarth interface. At the top, there are tabs for 'Lines', 'Communication', 'Custom', and 'GHG Emissions'. Below the tabs, a '0.00' value is shown next to a 'Clear All Lines' button. The main area contains a table with the following columns: Credit, Memo, Name, Department, Class, Location, Schedule, Start Date, End Date, Residual, GHG Impact, GHG Expense Category, GHG Calculation Method, GHG Activity, GHG Emissions Value (MtCO2e), Eliminate, Related Asset, and View Emissions Data. The 'GHG Impact' through 'View Emissions Data' columns are highlighted with a red border. Below the table, there are buttons for '+ Insert' and 'Remove'. At the bottom, there are 'Save', 'Cancel', and 'Actions' buttons, along with a 'Liora AI Assistant' button.

10. Save the emissions data in the popup to return to the main Journal Entry form.
11. Add additional lines as needed and repeat the process for each line that contributes to emissions.
12. **Save** Journal Entry. The transaction becomes available for emissions review and approval.
13. The saved entry flows into the **Emissions Workbench** under Incomplete Transactions or Pending Approval, where emissions can be reviewed, approved or rejected based on configured workflows.
14. Approved emissions from Journal Entries are included in SuiteEarth dashboards and GHG reports, while rejected entries are excluded.

13. Employee Commuting

13.1 Setting Employee Commuting Defaults

1. Log in as **ESG Employee Center**. Go to **Employee Commuting > Employee Commuting > ESG Employee Commuting Defaults**.
2. Open the Employee Commuting Defaults record.
3. In the **Mode of Work** field, select the standard work mode for commuting.
4. In the **Activity Type** field, select the appropriate commute activity category.
5. In the **Activity Subtype** field, define the specific commute activity.
6. In the **Distance Units** field, select the applicable unit of measurement.
7. In the **Distance Travelled** field, enter the standard commute distance.
8. Click **Save**.

Note: The saved values are applied automatically when creating a new Employee Commuting Assessment.

The screenshot shows the Oracle NetSuite interface for the 'Employee Commuting Defaults' record. The page has a top navigation bar with 'ORACLE NetSuite' and a search bar. Below the navigation bar, there are tabs for 'Activities', 'Employee Commuting', 'Transactions', 'SuiteApps', 'Support', and 'Knowledge Base'. The 'Employee Commuting' tab is active. The main content area is titled 'Employee Commuting Defaults' and includes a 'Save Defaults' button. The record is divided into two sections: 'Primary Information' and 'Activity Defaults'. In the 'Primary Information' section, the 'Employee' is 'Thomas Mitchell', the 'Employee Subsidiary' is 'Headquarters', and the 'Employee Location' is 'USEPA'. In the 'Activity Defaults' section, the 'Activity Name' is 'Employees Commuting', the 'Activity Type' is 'Employees Commuting - Road', the 'Activity Subtype' is 'Employee - Passenger Car', the 'Mode of Work' is 'Work From Office', the 'Distance Unit' is 'Mile', and the 'Travel Distance' is '15'.

13.2 Creating a New Employee Commuting Assessment

1. Log in as **ESG Employee Center**. Go to **Employee Commuting > Employee Commuting**.
2. Click **New Employee Commuting Assessment**.
3. In the **Primary Information** section, select the **Location** for the assessment.
4. The **Secondary Information** section is populated automatically based on commuting defaults.
5. In the **Add Employee Commuting Record** section, review the auto-populated fields, including Mode of Work, Activity Type, Activity Subtype, Primary Mode of Distance and Distance Units.
6. Adjust any values if the commuting scenario requires updates.
7. Select the **Commute Start Date** and **Commute End Date** for the assessment.

8. Emissions values are calculated automatically based on the selected dates and predefined commuting attributes.
9. Click **Save** to complete the assessment.



Note: Setting Employee Commuting Defaults is not required for every assessment. Defaults only need to be configured once and can be reused for all future commuting assessments unless changes in commuting patterns or reporting requirements occur.

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Activities Employee Commuting Transactions SuiteApps Support Knowledge Base

Add Employee Commuting Record

Select Date
Used for daily commuting record entry

April 2026

Selected Days: 3

Select Mode of Work: Work From Office

Activity Type: Employees Commuting - Road

Activity Subtype: Employee - Passenger Car

Primary Mode Distance: 15

Distance Unit: Mile

Emissions Value: 0.027706 MtCO2e

Save Back Cancel

14. Tracking Emissions from Expense Reports

1. Log in as **ESG Employee Center**. Go to **Transactions > Transactions > Expense Reports**
2. Verify that the **Custom Form** is set to GHG Expense Report.
3. Enter the **Date, Posting Period, Currency and Exchange Rate**.
4. Enter the **Purpose** of the expense report, if required by internal policy.
5. Review summary values such as Expenses Total, Reimbursable Expenses, Corporate Card and Total Reimbursable Amount in the Summary panel.
6. Confirm the **Subsidiary** under the Classification section. Subsidiary determines reporting structure, emissions boundaries and default settings.

7. Open the **Expenses** tab to record expense lines.
8. Select the expense **Category** and enter the **Amount, Memo** and additional attributes such as Department, Class and Location if necessary.
9. Enter the **Activity Code** and **Activity Ledger** if they are part of the configured GHG extensions.
10. Review the emissions-related fields displayed for the line item:
 - GHG Impact
 - GHG Calculation Method
 - GHG Activity
 - GHG Emissions Value (MtCO₂e)

Note: Depending on the expense category selected, the GHG Impact may vary. Some expense categories contribute to emissions calculations, while others do not generate any GHG Impact

11. Select **View Emissions Data** on the line to open the emissions data window. This window displays emissions factors, emissions source details, calculation inputs and the resulting emissions value.

12. Adjust emissions inputs or activity mapping where required and save the emissions data.
13. Add additional expense lines as needed, repeating the emissions review process for each emissions-relevant line.
14. Ensure imported expenses, if any, are reconciled by selecting **Imported Expenses** and validating the GHG fields.

The screenshot shows the 'Expenses' tab with the 'GHG Emissions' sub-tab selected. At the top, there are buttons for 'Show Policies', 'Imported Expenses (0)', and 'Clear All Lines'. Below these is a table with columns: Category, Foreign Amount, Currency, Exchange Rate, Amount, Memo, Location, Customer, Billable, Attach File, Receipt, Activity Ledger, GHG Impact, GHG Calculation Method, GHG Activity, GHG Emissions Value (MtCO2e), and View Emissions Data. The last five columns are highlighted with a red box. Below the table is a toolbar with 'Copy Previous', '+ Insert', and 'Remove' buttons. At the bottom, there are 'Save' and 'Cancel' buttons, and a 'Liora AI Assistant' button on the right.

15. Save the Expense Report draft for internal workflow or submit it for approval, depending on configuration.
16. Once submitted, the Expense Report moves through the approval hierarchy. Approved expense reports flow into the emissions framework and appear in the Emissions Workbench.
17. Approved emissions from Expense Reports are included in dashboards and GHG reports. Rejected reports are excluded from emissions calculations.

15. Emissions Workbench

1. Login as **Sustainability Manager**. Go to **Measure > Monitor & Audit > Emissions Workbench**.
2. Select the **Transaction Type**, **Financial Year** and **Month** to filter emissions records for the required reporting period.
3. Select the **Subsidiary** and **Location** to refine the results further.
4. Review the **Incomplete Data** tab to identify transactions missing emissions details. Select **View** on a line to open the transaction and complete the required emissions fields.
5. Review the **Pending Approval** tab to validate transactions that are ready for approval. Select **View** to approve or reject the transaction.

 **Note:** Bulk approval is supported. Multiple transactions can be approved simultaneously by selecting the checkbox for each item in the Pending Approval tab and submitting the approval action.

6. Review the **Rejected** tab to track transactions that were declined and require corrections or resubmission.
7. Review the **Approved** tab to view transactions that have successfully passed the validation and approval process.

 **Note:** If **Auto Approval** is enabled in the approval status configuration, emissions records are automatically moved to the **Approved** tab in the Emissions Workbench without requiring manual review.

8. Review the **All Activities** tab to view a consolidated list of all emissions-related transactions for the selected period and filters.
9. Use **Show Inactives** to include inactive records in the results when required.
10. Use the **Download** option to export the activity log for reporting or audit purposes.
11. For each transaction, review key information displayed in the grid, including Activity Log ID, Method, Transaction Type, Subsidiary, Document Number, Scope, Emissions Category, Activity Name, Emissions Value, Deducted Emissions, Ownership %, Ownership Emissions and Task Assigned.
12. **Save** updates as required. Approved transactions automatically flow into GHG dashboards, reporting modules and analytics.

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ActivitiesMeasureManageReportTransactionsListAnalyticsCustomizationDocumentsSetupSuiteAppsSupportKnowledge Base

Emissions Workbench

More

SubmitCancel

Transaction Type
All

Financial Year
FY 2026

Month
April

Subsidiary
All

Location
All

Vendor
<Type then tab>

Transaction Id
<Type then tab>

Incomplete Data

Pending Approval

Rejected

Approved

All Activities

☐ Show Inactives

☐ Auto-Approve

Total (23)

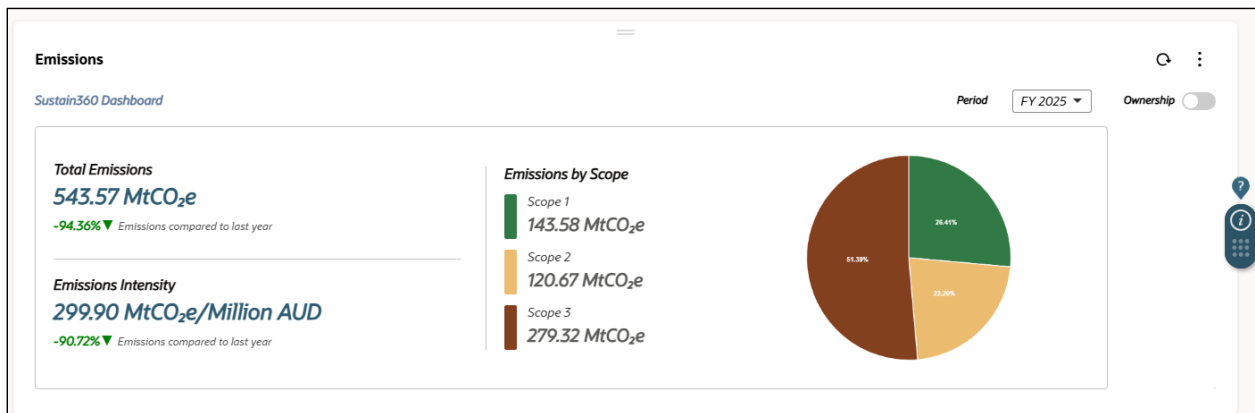
Mark AllUnmark AllDownload

Actions	Approve	Activity Log Id	Month	Method	Transaction Type	Subsidiary	Document Number	Scope	Emissions Category	Activity Name	Emissions Value (MtCO2e)	AI Suggestion	Deducted Emissions (MtCO2e)	Ownership %	Ownership
View	☐	2051	April	Second	Bill	Headquarters : General	Bill #125602	Scope 3	Purchased	Purchased	5.748			100	5.748

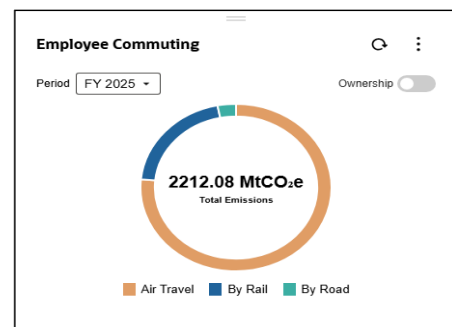
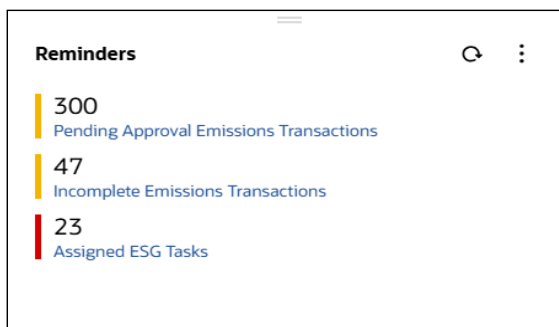
Lora AI Assistant

16. Emissions Dashboards

1. Log in as **Sustainability Manager/Analysts** to access emissions dashboards and sustainability portlets.
2. Navigate to **Home > Dashboard**.
3. The dashboard displays emissions information consolidated from all approved transactions, including Vendor Bills, Purchase Orders, Credit Card Charges and Credits, Journal Entries, Expense Reports and Employee Commuting Assessments.
4. Review the **Sustain 360 Dashboard**, which includes Total Emissions, Emissions Intensity and Emissions by Scope for the selected reporting period.

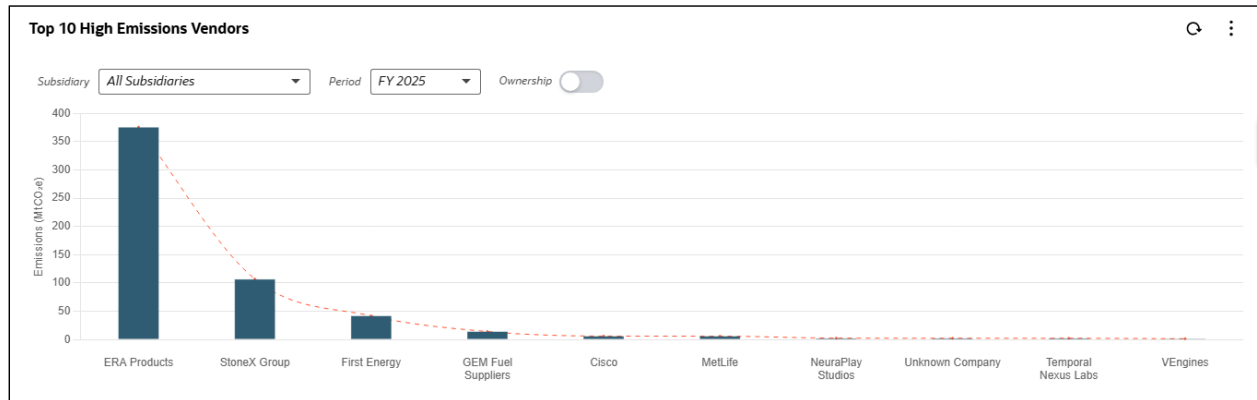


5. Use the **Period** filter or **Ownership** toggle to refine the displayed emissions based on reporting preferences.
6. Review the **Reminders** portlet to track items requiring action, such as Pending Approval Emissions Transactions, Incomplete Emissions Transactions and Assigned ESG Tasks.
7. Review the **Employee Commuting** portlet to view commute-related emissions by mode of travel, including air travel, rail and road.



8. Review the **GHG Emissions Summary** portlet to analyze emissions trends across Scope 1, Scope 2 and Scope 3 categories.
 - Use filters such as Scope Type, Subsidiary and Period to adjust the view.
 - Enable “Show Trend Graph” if trend visualizations are required.

- Review the **Top 10 High Emissions Vendors** portlet to identify vendors contributing the highest emissions within the selected reporting period and subsidiary.

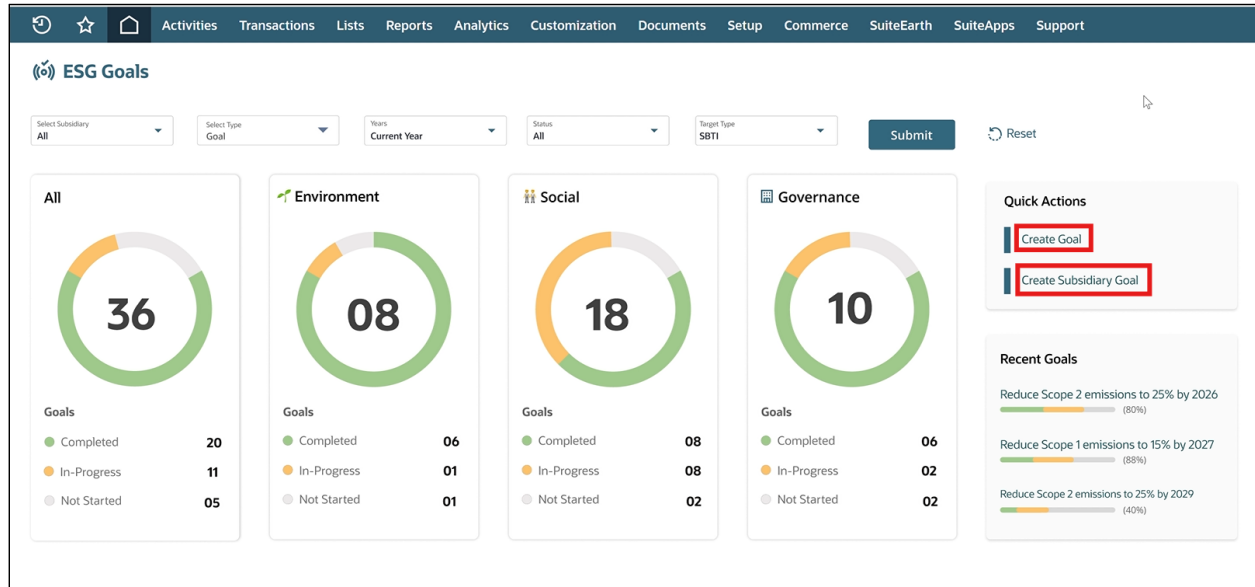


- Use subsidiary, period and ownership filters to refine vendor emissions insights and compare contributions across entities.
- Scroll within each portlet where available to view additional data bars, trend lines or summaries.
- Select drill-down links on any emissions number or chart segment to open detailed transaction lists contributing to that metric.
- Personalize the dashboard using the **Personalize** option in the upper-right area.
 - Add or remove portlets as required.
 - Rearrange portlets to suit workflow preferences.
 - Apply filters, adjust chart settings or change display formats based on reporting needs.
- Use the **Portlet date settings** to update the reporting period for all portlets simultaneously, ensuring the dashboard reflects the correct fiscal or custom period.
- All emissions displayed on the dashboard reflect approved transactions only. Pending or rejected entries do not contribute to metrics or charts.

17. ESG Goals

17.1 Goals - Define organization-level targets.

17.2 Sub Goals (Subsidiary Goal) - Allows subsidiaries to align with and contribute to the Parent Goal.



17.1 Goals

1. Login as Sustainability Manager. Go to **Manage > Assess & Improve > ESG Goals > Create a Goal**.
2. Select the **Target Type** to define the goal measurement method.

Note: The SBTi target type is currently supported only for Environment classification goals.

3. Select the **Company Type** to classify the applicable organization type.
4. Enter the **Goal Name** to identify the ESG target being established.
5. Enter the **Goal Description** with a detailed explanation of the objective, calculation methodology, assumptions, or reporting purpose. Review the Subsidiary to define the reporting boundary for the goal. Goals can apply to a single subsidiary or all subsidiaries.
6. Select the **Classification** to categorize the goal under Environment, Social, or Governance.
7. Select the **Group** to associate the goal with an ESG category such as Energy, Waste, Water, Diversity, or Compliance.
8. Select the **Scope** (Scope 1, Scope 2, or Scope 3) to indicate which emissions category the goal targets.
9. Select the **Base Year**, which represents the starting point for comparison and performance measurement.
10. Select the **Start Year** to define the first year of goal tracking.
11. Select the **End Year** to define the completion year or evaluation period for the goal.

12. Review the **Start Date**, which is automatically populated based on the selected Start Year.
13. Review the **End Date**, which is automatically populated based on the selected End Year.
14. Review the **UOM (Unit of Measurement)**, which is automatically derived from the selected classification, group, and scope configuration.
15. Review the **Baseline Year Value**, which is automatically calculated from ESG data associated with the selected Base Year.
16. Review the **Current Year Value**, which displays the latest available performance value for the selected goal category.
17. Enter or review the **Goal Target %**, which defines the percentage reduction, improvement, or increase to be achieved by the goal.
18. Review the **Reduction Required** value, which is automatically calculated based on the Baseline Year Value and Goal Target %.
19. Review the **Goal Target Year Value**, which represents the expected value to be achieved by the target year after applying the Goal Target %.
20. Review the **Goal Coverage %**, which displays the percentage of the goal currently covered by associated ESG programs and initiatives.
21. Review the **Status** under Secondary Information. By default, a new goal is set to Not Started, but this can be updated as progress is made.
22. Select **Assign Owner** to designate the individual responsible for tracking, managing, and reporting progress on the goal.
23. Click **Save ESG Goal** to complete the creation process. Once saved, the goal becomes available for monitoring, reporting, and dashboard tracking.

Create ESG Goal

Primary Information

Target Type *

Goal Name *

Goal Description

Subsidiary

All Subsidiaries

Classification *

Group

Scope

- New -

Scope 1

Scope 2

Base Year *

FY 2025

Start Year *

FY 2025

End Year *

FY 2030

Start Date *

End Date *

UOM

Baseline Year Value

Current Year Value

Goal Target % *

Reduction Required

Goal Target Year Value

Goal Coverage %

Secondary Information

Status

Not Started

Assign Owner

Thomas Mitchell

Save ESG Goal

17.2 Sub Goal (Subsidiary Goal)

1. Login as **Sustainability Manager**. Go to **Manage > Assess & Improve > ESG Goals > Create a Subsidiary Goal**.
2. Select the **Linked Goal**, which represents the Parent Goal that the subsidiary goal contributes to.
3. Enter the **Subsidiary Goal** Name to identify the goal at the subsidiary level.
4. Review the **Owner** responsible for monitoring and updating the subsidiary goal.
5. Review the **Subsidiary** to define the reporting boundary for the subgoal.
6. Review the **ESG Classification**, chosen from Environment, Social or Governance.
7. Select the **Material Topic** that aligns with the objective of the subsidiary goal.
8. Review the **Scope** (Scope 1, Scope 2 or Scope 3) to specify which emissions category the goal targets.
9. Review the **Base Year**, which serves as the reference year for tracking improvements.
10. Review the **Base Year Intensity**, representing the baseline intensity value for the subsidiary.
11. Review the **Current Year Intensity**, if available at the time of creation.
12. Review the **UOM** (Unit of Measurement) applicable for intensity or performance metrics.
13. Review the **Subsidiary Goal Target %**, indicating the reduction or improvement percentage the subsidiary aims to achieve.
14. Review the **Subsidiary Goal Target Year Intensity**, representing the expected intensity after applying the target percentage.
15. Review the **Start Date** and **End Date** for the goal timeline.
16. Review the **Start Year** and **End Year** to define the reporting period used in dashboards and performance summaries.
17. Review the **Subsidiary Goal Status**, which defaults to Not Started and can be updated as progress is made.
18. Review the **ESG Group Type**, which corresponds to goal grouping structures such as Energy, Waste or Water.
19. Open the **Notes** tab if needed and add internal notes, including the title, memo, date and other relevant details.
20. Select **Submit** to save the Subsidiary Goal. The subgoal becomes available for tracking and reporting.

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Create Subsidiary Goals

SubmitCancel

▼ Primary Information

Linked Goal *
Subsidiary Goal Name *
Owner
Subsidiary *
ESG Classification *
Material Topic
Energy consumption and efficiency
Water consumption and efficiency

Scope
Base Year
Base Year Intensity
Current Year Intensity
UOM
Subsidiary Goal Target % *
Subsidiary Goal Target Year Intensity

Start Date
End Date
Start Year
End Year
Subsidiary Goal Status
Not Started
ESG Group Type

More

18. ESG Programs

1. Log in as a **Sustainability Manager** and navigate to **Manage > ESG Programs**.
2. Select the **Associated Subsidiary Goal** to link the program to a specific subsidiary-level ESG goal.
3. Review the **Associated Goal** field, which is automatically populated based on the selected Subsidiary Goal.
4. Enter the **ESG Program Name** to identify the program or initiative being tracked.
5. Select the **Subsidiary** for which the program is being created.
6. Select the **Target Year** for the program.
7. Review the **Classification** field, which is automatically populated based on the associated goal.
8. Review the **ESG Group** field, which is automatically derived from the selected classification and linked goal.
9. Select the applicable **Scope** (Scope 1, Scope 2, or Scope 3).
10. Review the **UOM (Unit of Measurement)**, which is automatically populated from the associated goal and used for program tracking.
11. Review the **Subsidiary Goal Target Value**, which is automatically populated from the linked Subsidiary Goal.
12. Review or update the **Status**, which defaults to **Not Started**.
13. Review the **Base Year** and **Base Year Value (Program)** fields, which are automatically populated for reference.
14. Enter the **ESG Program Target %** to define the reduction or improvement target for the program.
15. Review the **ESG Program Target Year Value**, which is automatically calculated based on the entered target percentage.
16. Review the **Current Year Value**, which is automatically populated based on available emissions data.
17. Review the **Required Reduction** value, which indicates the reduction needed to achieve the target.
18. Review the **Actual Emissions Value**, which is automatically populated as actual emissions data becomes available.
19. Review the **Goal Contribution %**, which indicates the program's contribution toward achieving the associated goal.
20. Enter **Actions/Notes** to document planned activities, progress updates, assumptions, or other supporting information.
21. Review all entered information and verify that the program aligns with the associated goal and target values.
22. Click **Submit** to save the ESG Program. The program becomes available for dashboards, reporting, and performance tracking.

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ESG Programs

Submit Cancel

▼ Primary Information

Associated Subsidiary Goal *	UOM MTCO2e	Required Reduction
Associated Goal	Subsidiary Goal Target Value	Actual Emissions Value 0.000000
ESG Program Name *	Status Not Started	Goal Contribution %
Subsidiary *	Base Year	Actions/Notes
Target Year *	Base Year Value (Program)	
Classification	ESG Program Target %	
ESG Group	ESG Program Target Year Value	
Scope	Current Year Value	

19. Reports

19.1 GHG Disclosure Reports

1. Login as **Sustainability Manager**. Go to **Report > Disclose & Analyze> ESG Disclosure Report > Create Report**.
2. Enter the **Name** of the disclosure report.
3. Select the **Period** for which the disclosure report is being prepared.
4. Enter the **Due Date** for completing or submitting the disclosure.
5. Select the **Subsidiary** to define the reporting boundary.
6. Select the **Industry Type** to align the disclosure content with industry-specific reporting requirements.
7. Review the **Status**, which defaults to *Not Started*.
8. Select the **Owner** responsible for preparing or managing the disclosure report.
9. Select the **Framework**, such as GRI, CSRD, ISSB, SB 253/261, AASB 2 or any other configured GHG reporting standard.
10. Select the **Classification** by choosing one or more categories—Environment (E), Social (S), Governance (G) or General Requirements based on the disclosure areas being addressed.
11. In the **Disclosure Information** section, add disclosure records by selecting the Disclosure ID, Disclosure Name, Reporting Framework, Classification and Reporting Standard Section.
12. Add multiple disclosure entries as required for the chosen framework.
13. Review all information for accuracy and completeness.
14. Select **Save** to create the GHG Disclosure Report. The report becomes available for tracking, updating and exporting according to reporting needs.

ESG Disclosure Reports

Save Back

Name *

Period

Due Date *

Subsidiary *

Industry Type

Status
Not Started

Owner
Thomas Mitchell

Framework *

Classification
Environment (E)
Social (S)
Governance (G)

Disclosure Information

Disclosure ID	Disclosure Name	Reporting Framework	Classification	Reporting Standard Section
No records to show.				

Save Back

19.2 GHG Standard Reports

1. Login as Sustainability Manager. Go to **Report > GHG Report**.
2. The GHG Reports page provides a set of predefined saved searches used to analyze emissions across key business dimensions.
3. The page lists all available ESG reports with options to **View**, **Edit** or **Export (CSV)** for further analysis or integration with external reporting tools.
4. **Customer Emissions Report** is used to analyze emissions associated with products or items sold or purchased. It helps evaluate product-level carbon impact based on mapped item categories, purchased goods data or lifecycle-related emissions factors. This report supports product sustainability reviews and greener procurement decisions.
5. **Customer Overhead Emissions Report** is used to review indirect operational emissions generated from overhead activities such as utilities, rent, facility operations, administrative expenses or shared services. It helps to understand non-production emissions and improve operational efficiency.
6. The standard GHG reports available include:
 - GHG – Emissions data by Expense Category
 - GHG – Emissions data by Item
 - GHG – Emissions data by Vendor
 - GHG - Emissions Per Gas Report
 - GHG - Emp Commuting Detail Report
 - GHG - Emp Commuting Summary Report
 - GHG Employee Commuting by Activity Type
 - Customer Emissions by Invoice
 - Customer Overhead Emissions by Invoices
 - Operational Expense Emissions Intensity
 - Outstanding GHG Activities
 - Emissions Transactions Dashboard
7. Each report displays emissions values calculated from approved transactions and mapped GHG activity types, enabling deeper visibility into emissions performance.
8. Use **Export (CSV)** to download the report results and perform additional analysis outside NetSuite, such as for GHG disclosures, audits or management reporting.

ESG - Standard Reports

Total: 12

Edit View	Internal ID	Title	Export Results
Edit View	735	Customer Emissions by Invoice	Export (CSV)
Edit View	709	Customer Overhead Emissions by Invoices	Export (CSV)
Edit View	710	Operational Expense Emissions Intensity	Export (CSV)
Edit View	305	Outstanding ESG Activities	Export (CSV)
Edit View	634	Emissions Transactions Dashboard	Export (CSV)
Edit View	283	ESG - Emissions data by Expense Category	Export (CSV)
Edit View	282	ESG - Emissions data by Item	Export (CSV)
Edit View	277	ESG - Emissions data by Vendor	Export (CSV)
Edit View	276	ESG - Emissions Per Gas Report	Export (CSV)
Edit View	238	ESG - Emp Commuting Detail Report	Export (CSV)
Edit View	240	ESG - Emp Commuting Summary Report	Export (CSV)
Edit View	615	ESG Employee Commuting by Activity Type	Export (CSV)

20. GHG Period Close

1. Login as **Sustainability Manager**. Go to **Manage > Assess & Improve > ESG Period Close**.
2. Select the required **Fiscal Period** from the Period dropdown.
3. Review the list of ESG periods displayed for the selected year, including Month, Posting Period, Start Date, End Date, Accounting Period Closed status and Emissions Period Status.
4. Verify the **Accounting Period Closed** status. The Emissions Period can be closed only when the corresponding accounting period is already closed.
5. Review the **Pending Approval Transactions** and **Incomplete Transactions** counts for each month. If any transactions exist, select **View Details** to review the records.
6. The **View Details** option routes the selected transactions to the Emissions Workbench, where they can be reviewed, approved, rejected or marked inactive as required.
7. Once all pending and incomplete transactions are resolved, update the **Emissions Period Status** to **Closed**.
8. If pending or incomplete transactions remain, the system does not allow the period to be closed.
9. Click **Submit** to save the updated period close status.

Month	Posting Period	Start Date	End Date	Accounting Period Closed	Emissions Period Status	Pending Approval Transactions	Incomplete Transactions	Pending Transactions Emission Value (MTCO2e)	View Details
Jan 2026	Q1 2026	1/1/2026	1/31/2026	No	Open	22	6	101.06	Click
Feb 2026	Q1 2026	2/1/2026	2/28/2026	No	Open	12	8	514.31	Click
Mar 2026	Q1 2026	3/1/2026	3/31/2026	No	Open	10	7	18.80	Click
Apr 2026	Q2 2026	4/1/2026	4/30/2026	No	Open	23	0	1,442.27	Click
May 2026	Q2 2026	5/1/2026	5/31/2026	No	Open	0	0	0.00	Click
Jun 2026	Q2 2026	6/1/2026	6/30/2026	No	Open	0	0	0.00	Click
Jul 2026	Q3 2026	7/1/2026	7/31/2026	No	Open	0	0	0.00	Click
Aug 2026	Q3 2026	8/1/2026	8/31/2026	No	Open	0	0	0.00	Click