SuiteEarth

Setup and User Guide

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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.

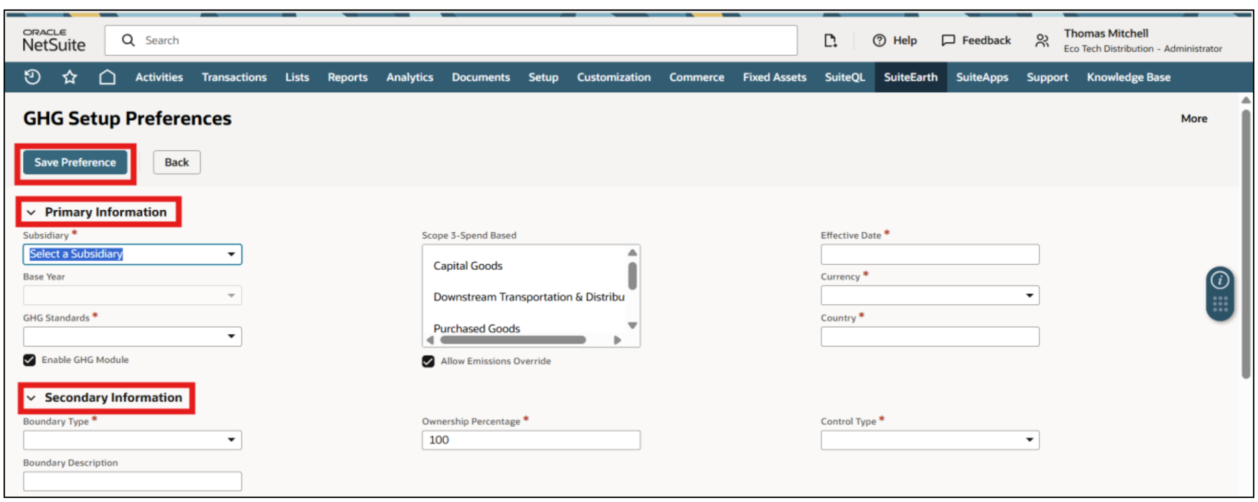
8. Save the stakeholder group.

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.

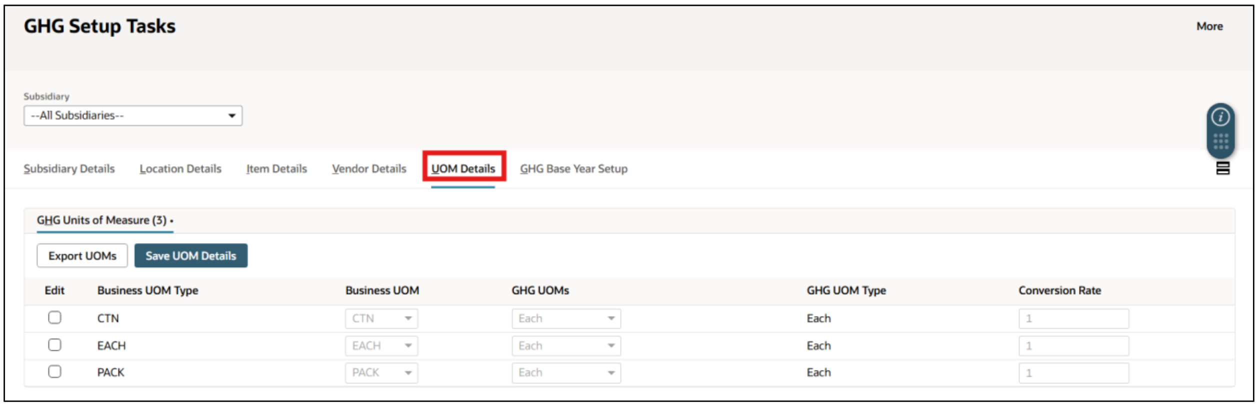
Control Approach (Operational/Financial)	As per lease agreement	Leased	Emissions are reported based on operational responsibility for leased assets.
Control Approach (Operational/Financial)	Share based on agreement	JV (Joint Venture)	Emissions are reported according to the terms of the joint venture 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 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.

6. Review the **LCA Enabled** setting to identify categories that support Life Cycle Assessment (LCA) calculations.

7. Click **View History** to review methodology changes and maintain an audit trail of configuration updates.

<u>Notes List</u>:

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

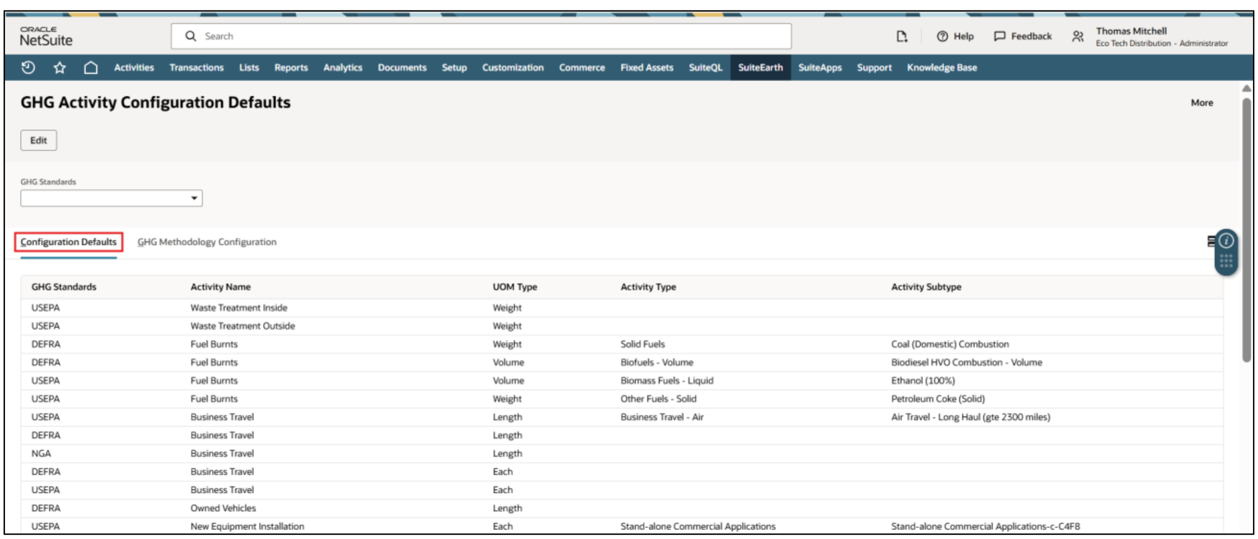
- Capital Goods
- Purchased Goods
- Purchased Services

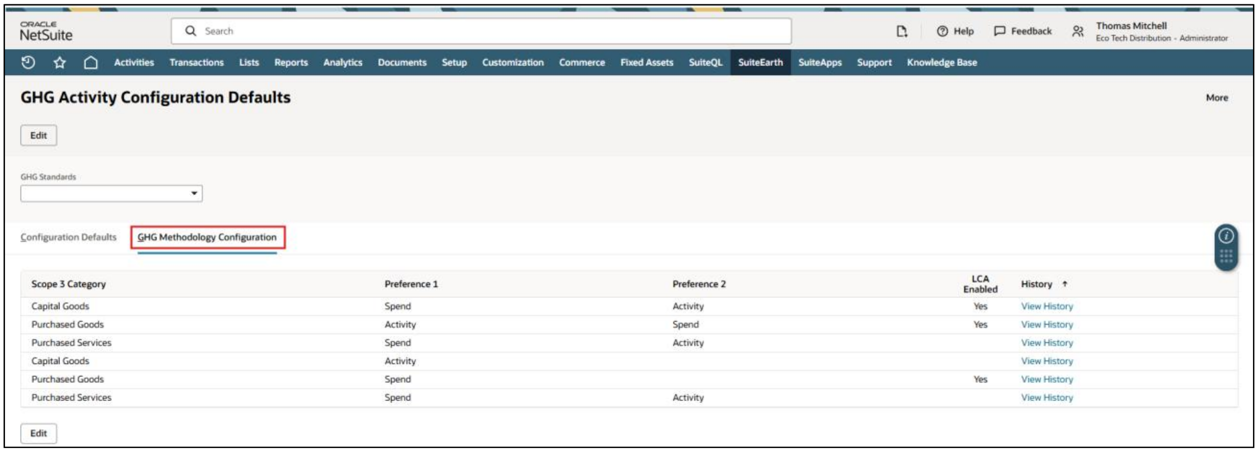
Note 2: For these categories, the system uses the configured methodology preference order to determine whether emissions are calculated using the Activity-Based or Spend-Based approach.

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.

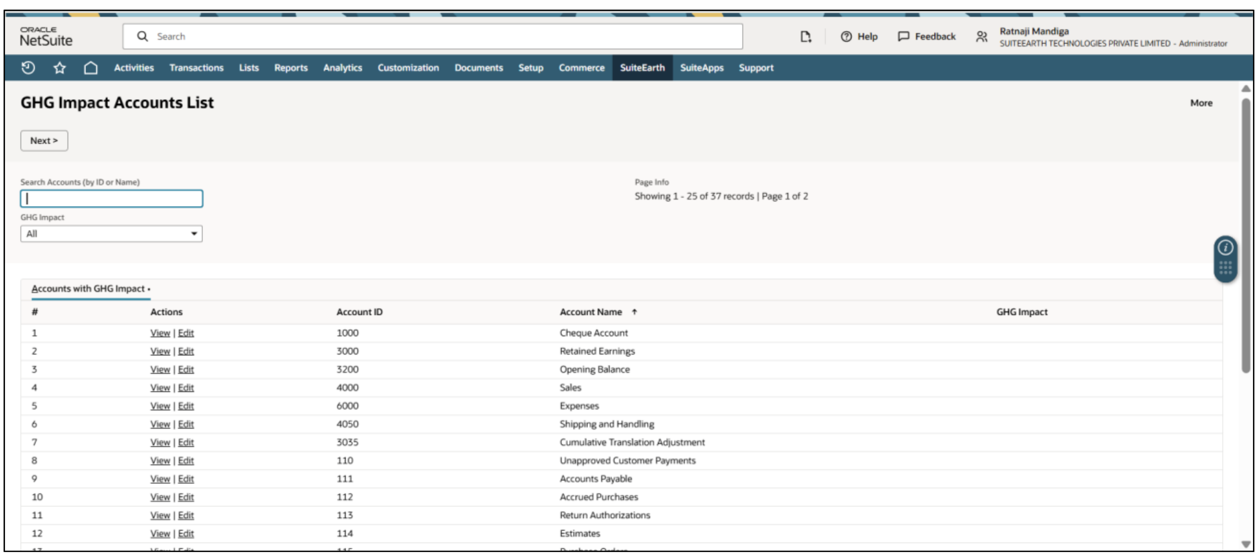
8. **Save** the record to apply the selected methodology preferences and activity default mappings.





3.4. GHG COA Details

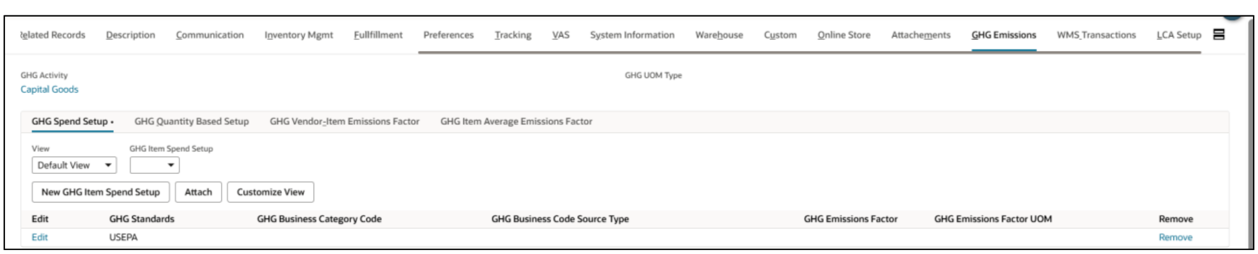
1. Login as **Administrator**. Go to **SuiteEarth > Setup > GHG COA Details.**
2. The GHG Impact Accounts List opens with search and filter options.
3. Use **Search Accounts** or the **GHG Impact** filter to locate the required account. Select **Edit**, then enable or update the relevant GHG Impact settings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



4. Item and Vendor GHG Emissions Setup

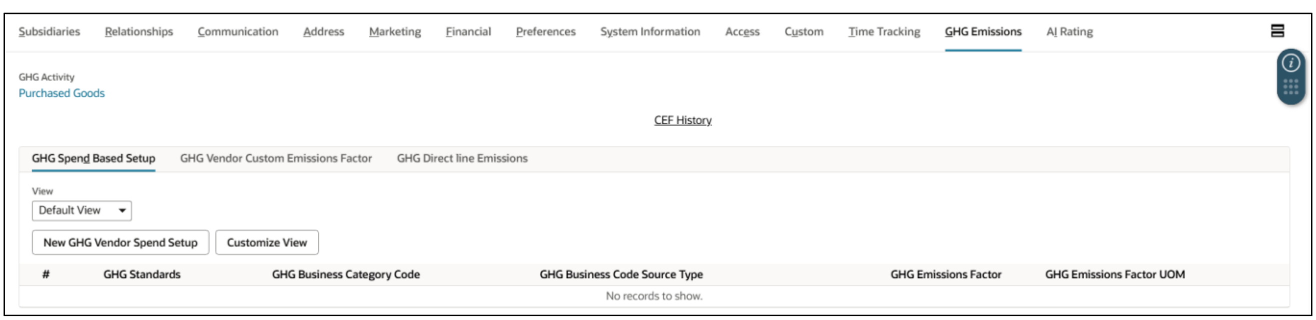
4.1. Item GHG Emissions Setup

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.



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.



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.

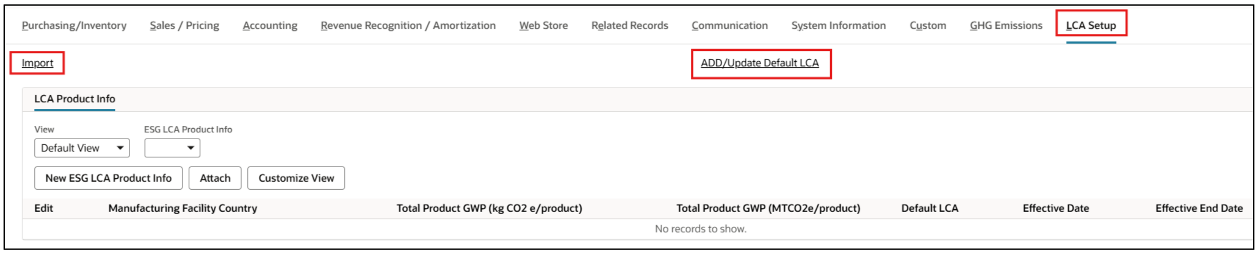
Note: If no valid emissions factor is identified through the configured hierarchy, the transaction is routed to the **Incomplete Transactions** tab in the Emissions Workbench for further review and completion.

5.3 Life Cycle Assessment (LCA) Methodology

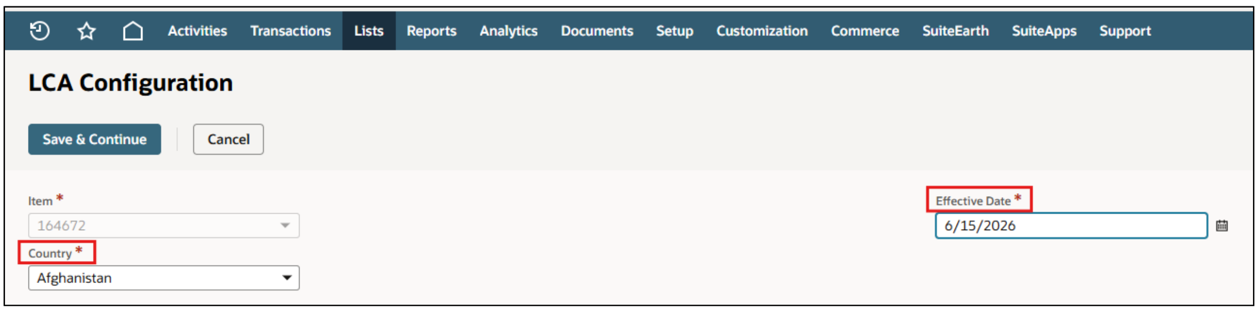
For organizations that have enabled the LCA module, SuiteEarth prioritizes LCA-based emissions data during emissions calculations. When valid LCA emissions data is available, it is selected before the standard emissions factor hierarchy. If LCA data is unavailable, the system automatically falls back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

To upload an LCA document for an item,

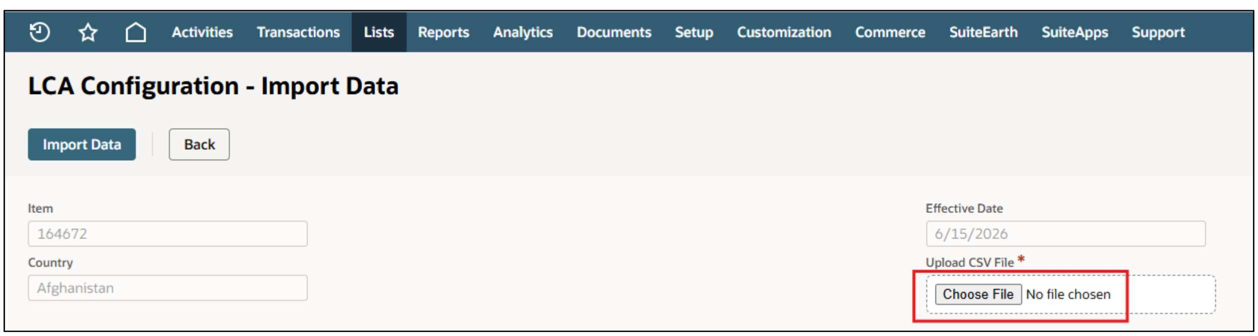
1. Open the **Item** record and navigate to the **LCA Setup** tab.



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.

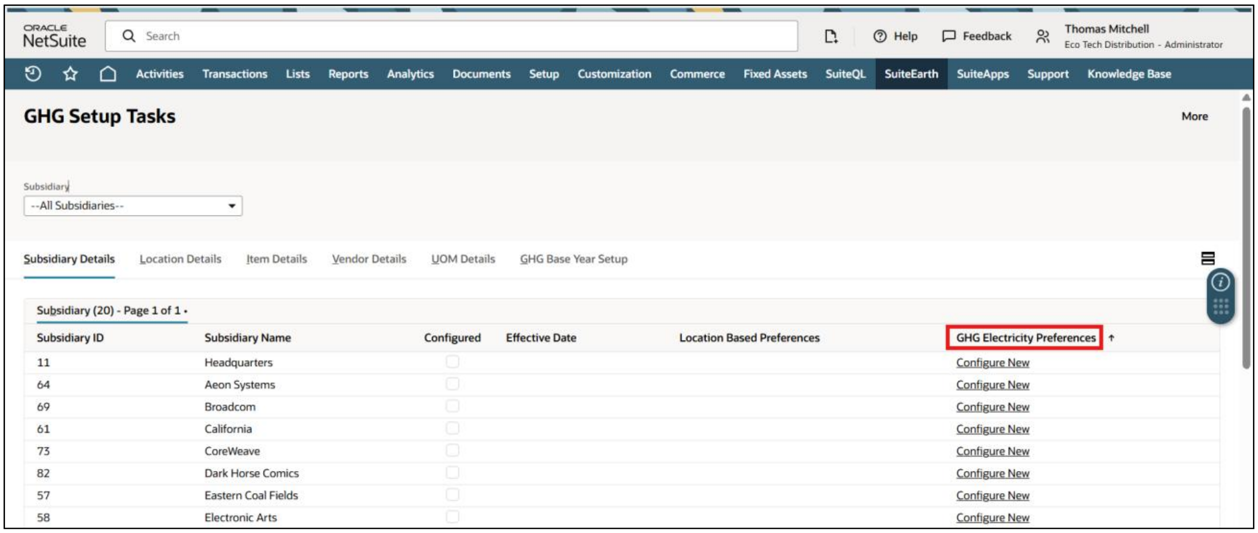


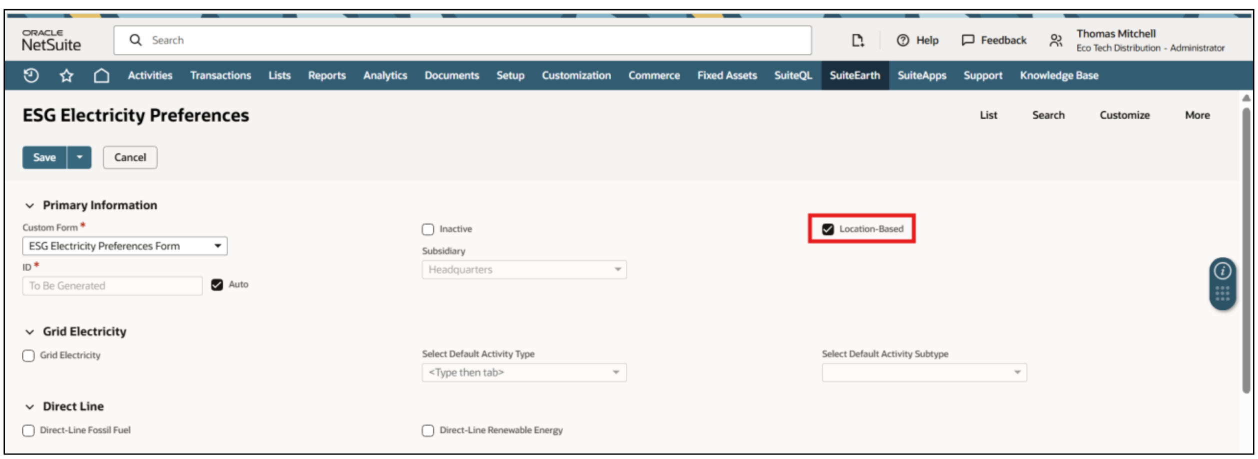
7. The uploaded LCA record becomes available under the **LCA Product Info** section of the **LCA Setup** tab.

> **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

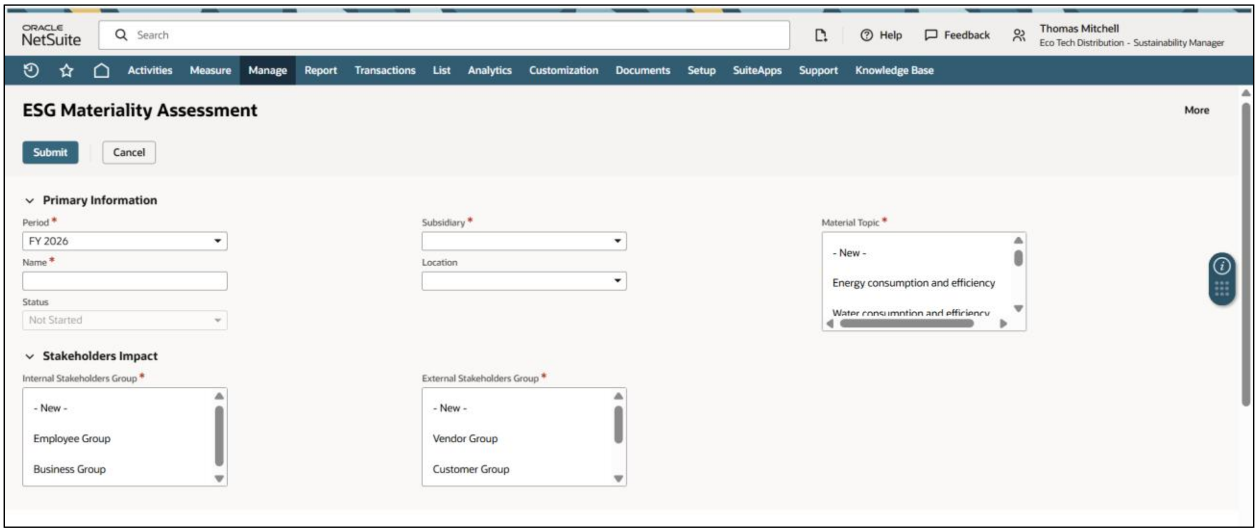
1. Login as **Administrator**. Go to **SuiteEarth > GHG Setup Tasks > GHG Electricity Preferences**
2. The form opens with **Location-Based** electricity preference options. Select the relevant settings and save the record to apply the changes.
3. The selected preferences are saved in SuiteEarth and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



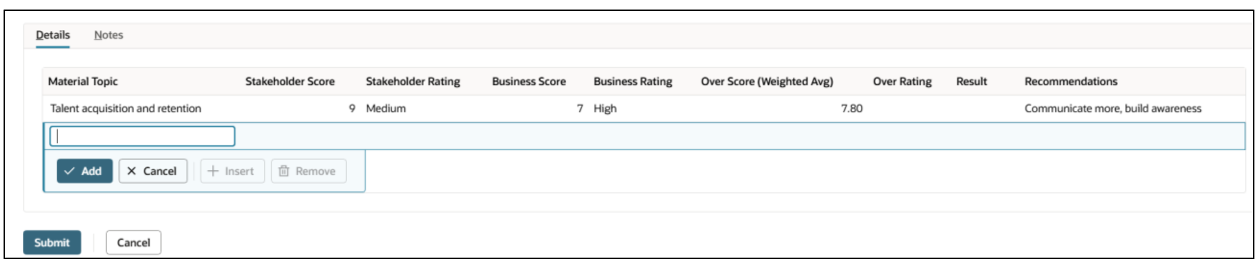


7. Materiality Assessment

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



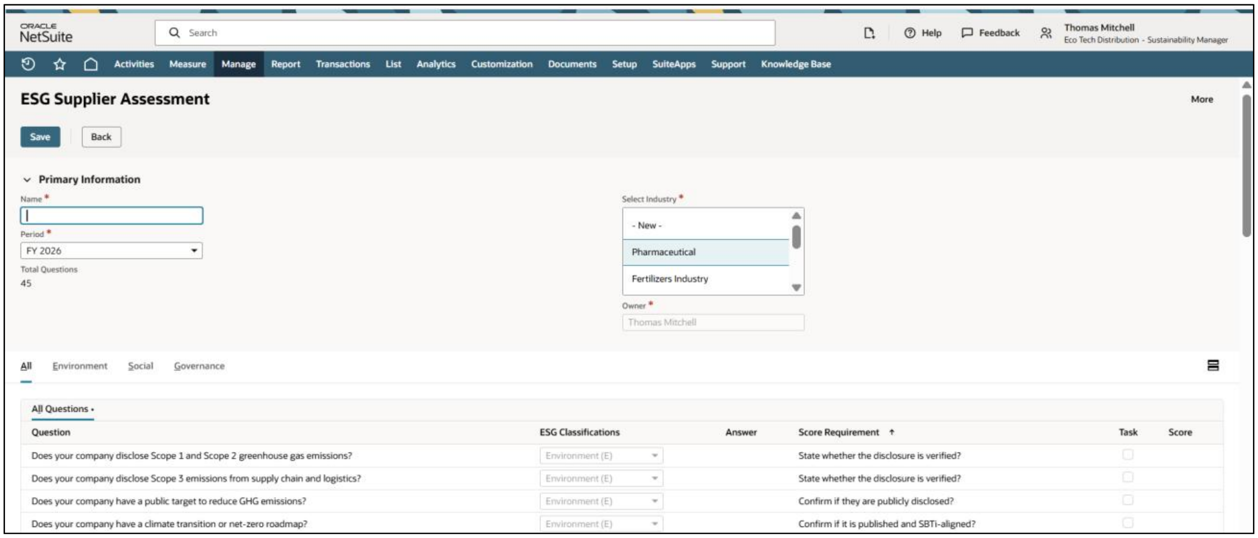
5. An external email is sent by the system to the relevant stakeholders, requesting their ratings.
6. After external forms are submitted with rating information, SuiteEarth automatically calculates the overall rating and displays it in the form.



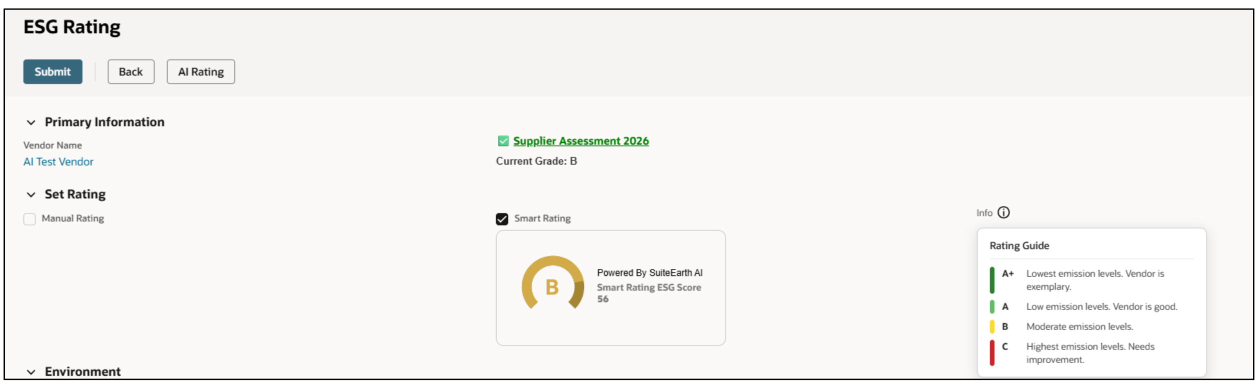
7. After all stakeholders submit their responses, the overall rating is displayed in the form.

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.

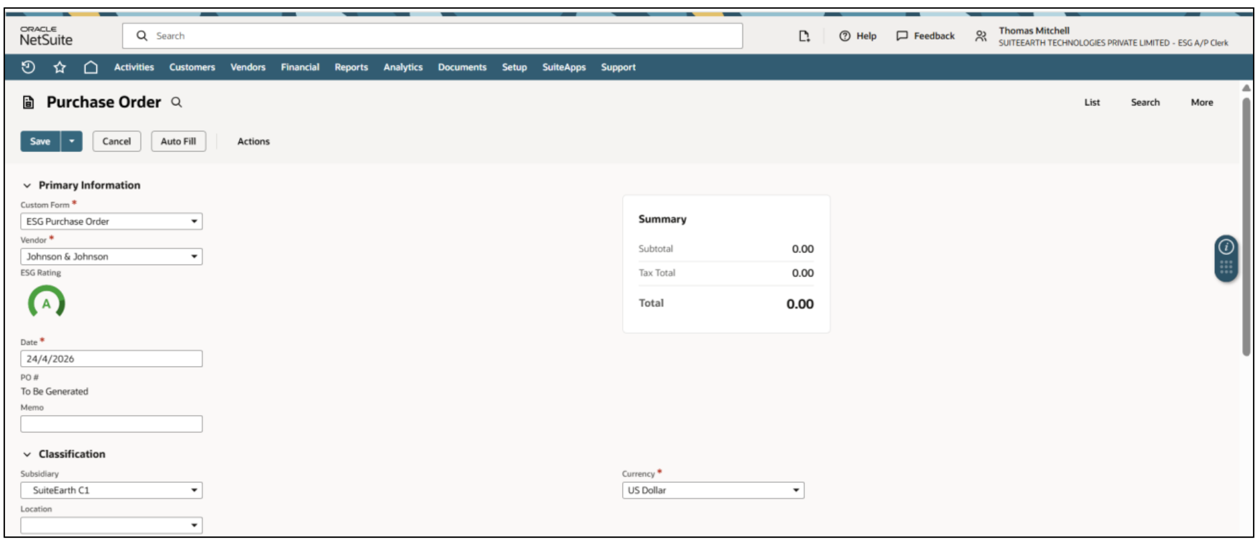


<u>Note</u>: SuiteEarth supports **AI Smart Vendor Rating**, which analyzes vendor assessment responses and ESG-related information to generate an AI-assisted sustainability rating. This rating helps organizations quickly evaluate vendor ESG performance, identify potential sustainability risks, and prioritize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



9. Tracking Emissions from a Purchase Order

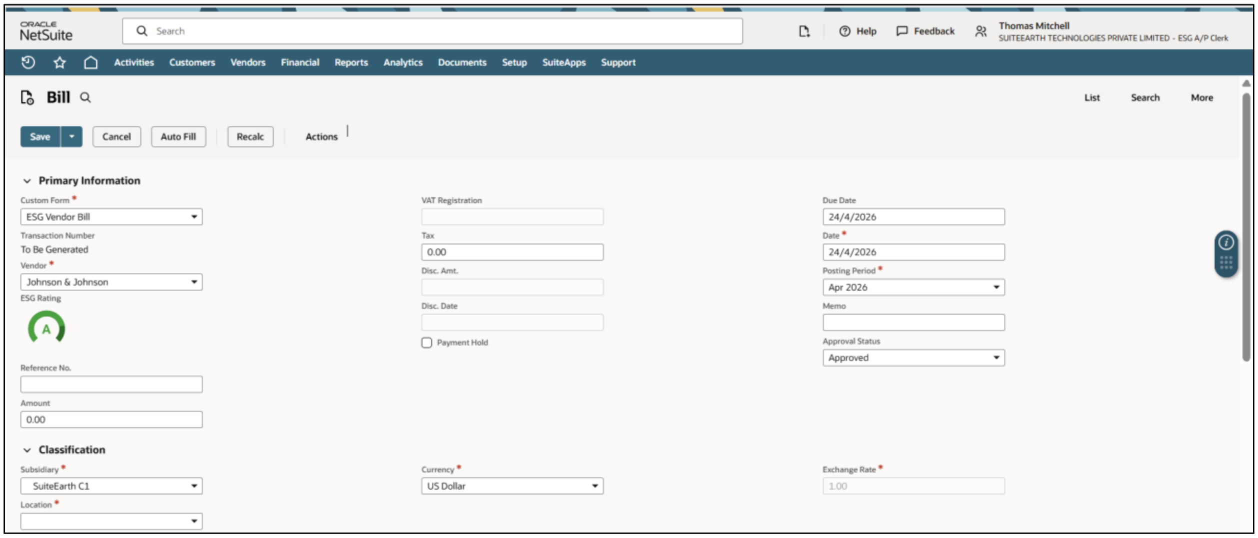
1. Login as **ESG A/P Clerk.** Go to **Vendors > Purchases > Enter Purchase Order**.
2. Enter the basic details, including vendor information.
3. Select the items to be purchased at the line level.
4. For each line item, the mapped GHG activity, calculation method and estimated emissions value is displayed.
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**.



10. Tracking Emissions from a Vendor Bill

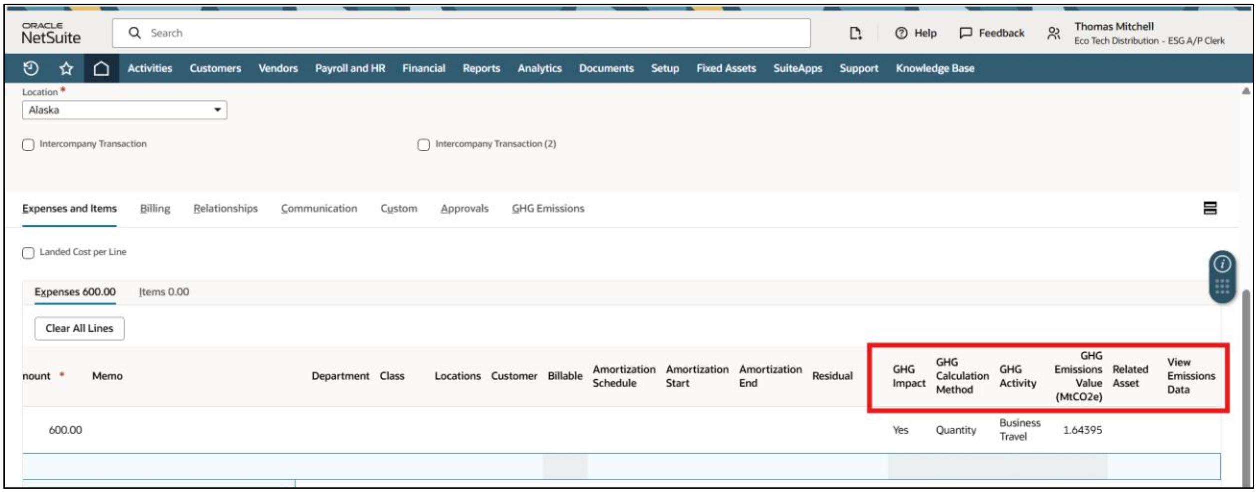
1. Login as **ESG A/P Clerk.** Go to **Vendors > Purchases > Enter Bills**.
2. Enter the basic details, including vendor information.

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



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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Reports
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SuiteApps
Support
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Intercompany Transaction
Intercompany Transaction (2)
Expenses and Items
Billing
Relationships
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GHG Emissions
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Items 0.00
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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

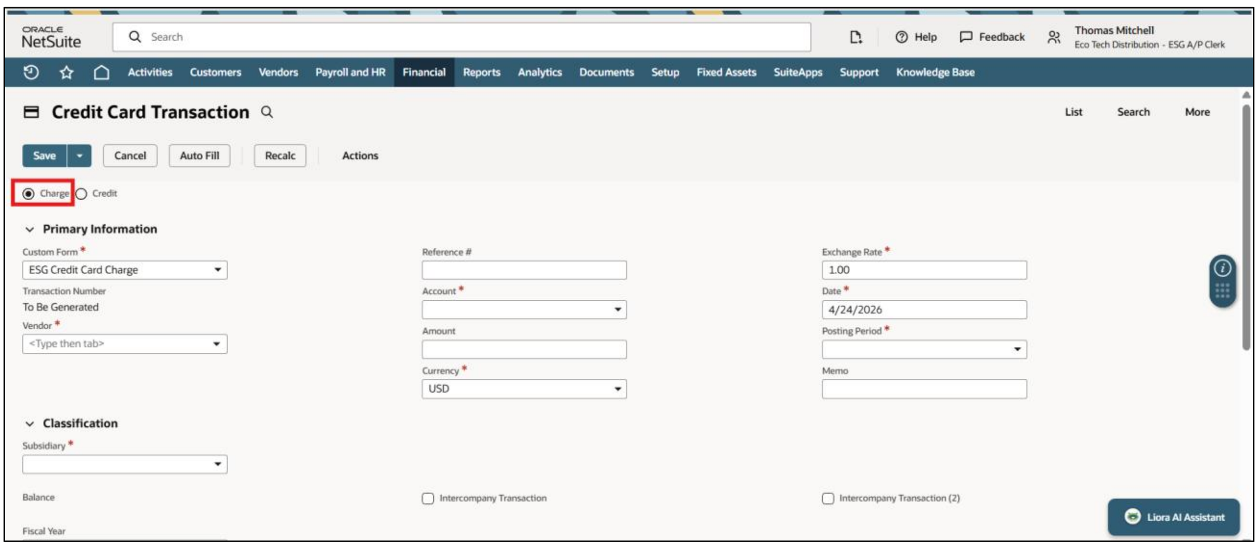
Credit Card Transactions provide two transaction types:

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.

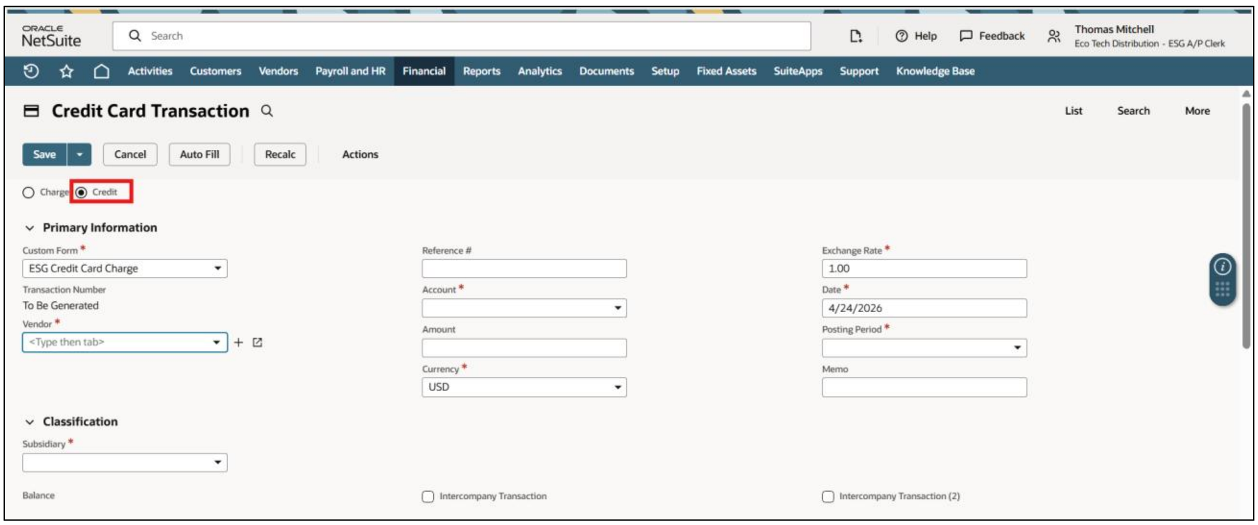


6. Select **View Emissions Data** on any line to review or adjust emissions details. The popup shows emissions factor source, activity type/subtype and the GHG Memo indicating whether the source is vendor, item or default activity configuration.
7. Save the emissions details in the popup and return to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

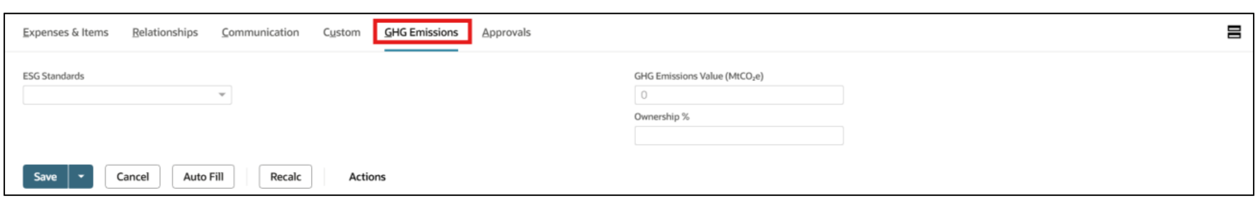
9. **Save** the Credit Card Charge. The transaction is recorded, available for reconciliation and flows into Emissions Workbench for review and approval.

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.



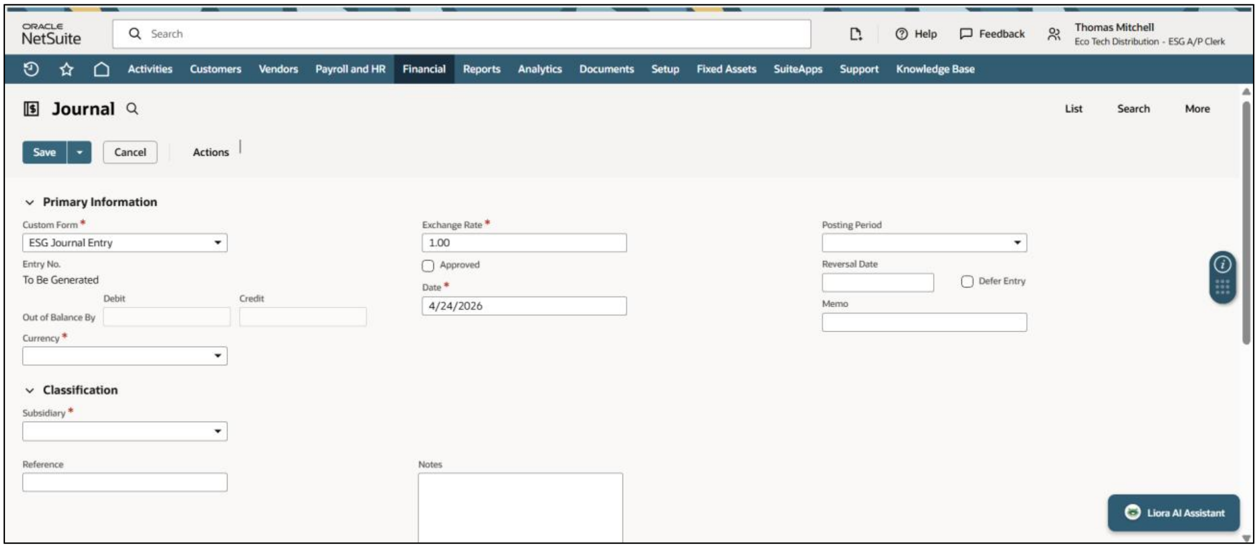
3. In the **Expenses & Items** tab, add the credit lines using the matching expense accounts from the original charge where possible.
4. For each credit line, the system calculates the emissions reduction using the same mapping logic as a normal charge.
5. Select **View Emissions Data** to review the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



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

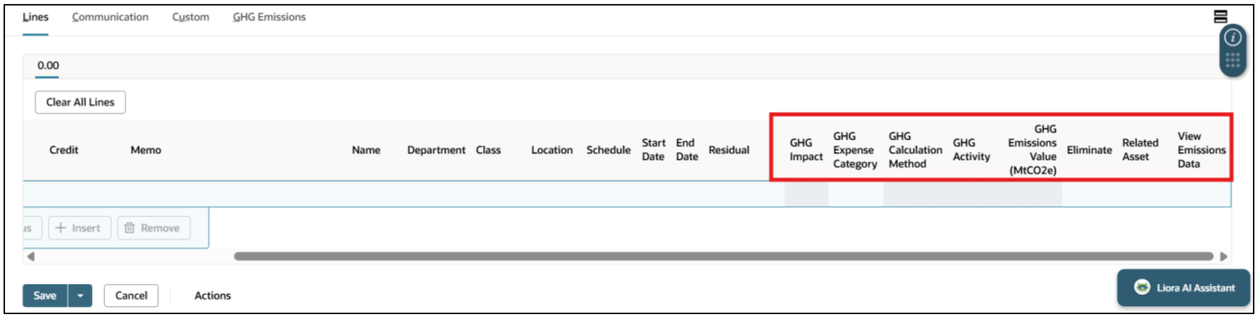
1. Login as **ESG A/P Clerk.** Go to **Financial > Other > Make Journal Entries**.
2. Verify the **Custom Form** is set to *ESG Journal Entry* or the appropriate configured form.
3. Enter the header details, including **Date**, **Posting Period**, **Currency** and **Exchange Rate**.
4. Select the **Subsidiary** 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 ($MtCO_2e$)

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.



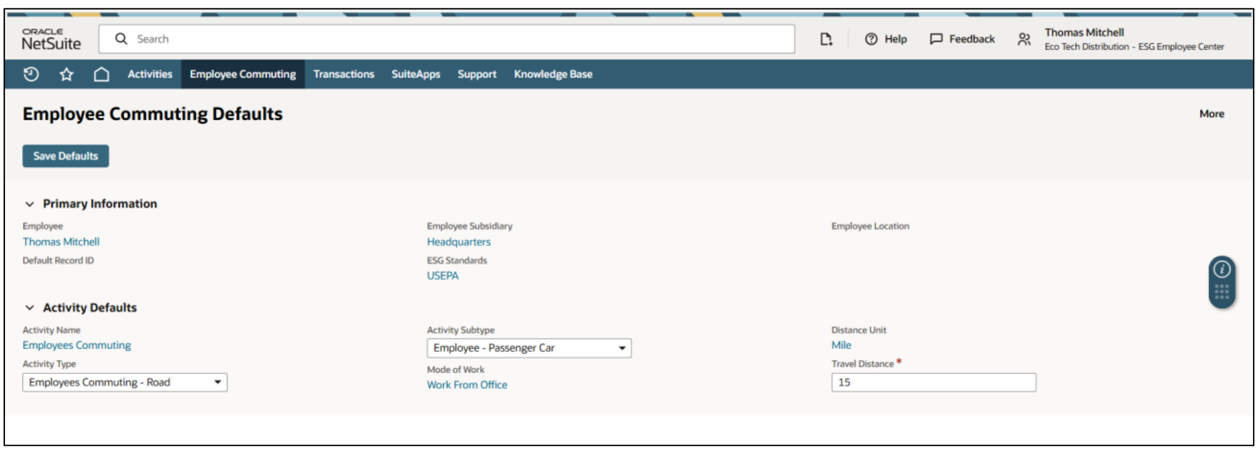
10. Save the emissions data in the popup to return to the main Journal Entry form.
11. Add additional lines as needed and repeat the process for each line that contributes to emissions.
12. **Save** Journal Entry. The transaction becomes available for emissions review and approval.
13. The saved entry 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.



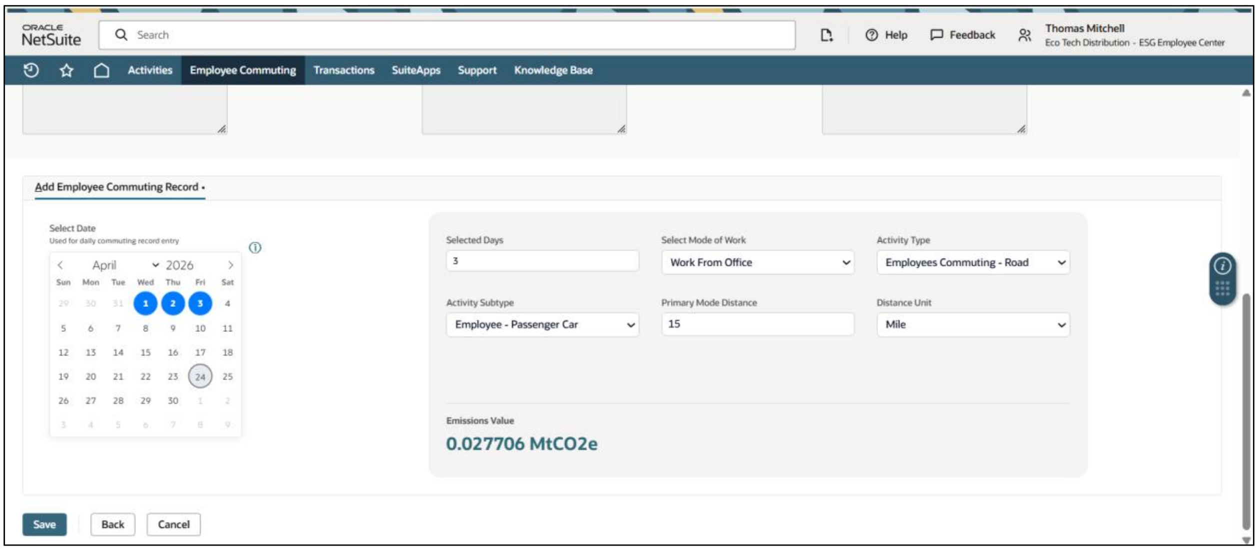
13.2 Creating a New Employee Commuting Assessment

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.

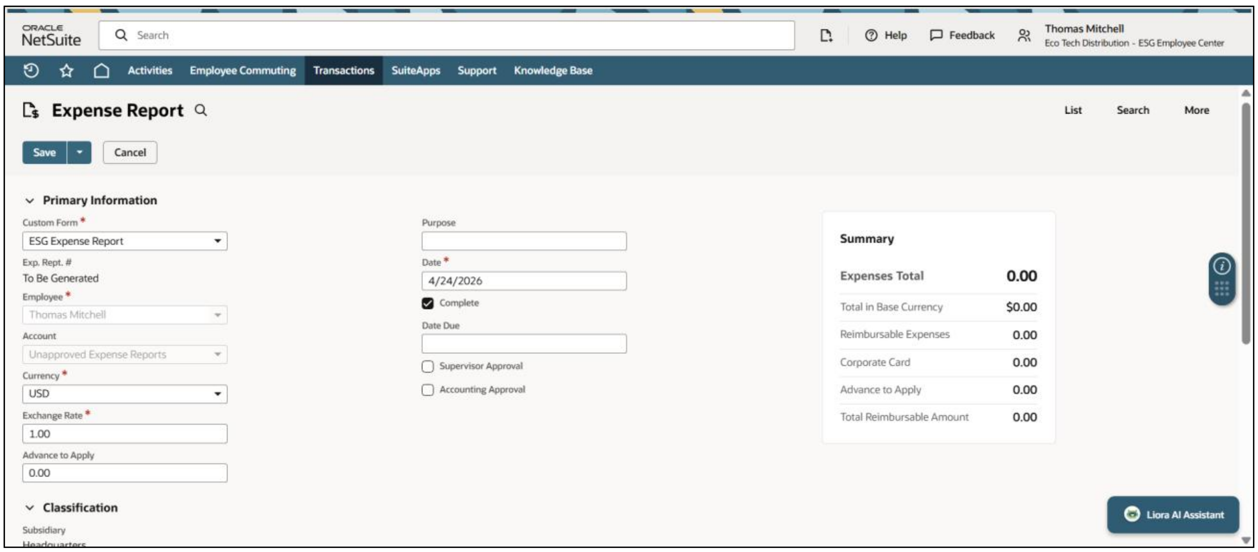
9. Click **Save** to complete the assessment.

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.



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 ($MtCO_2e$)

> **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.

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

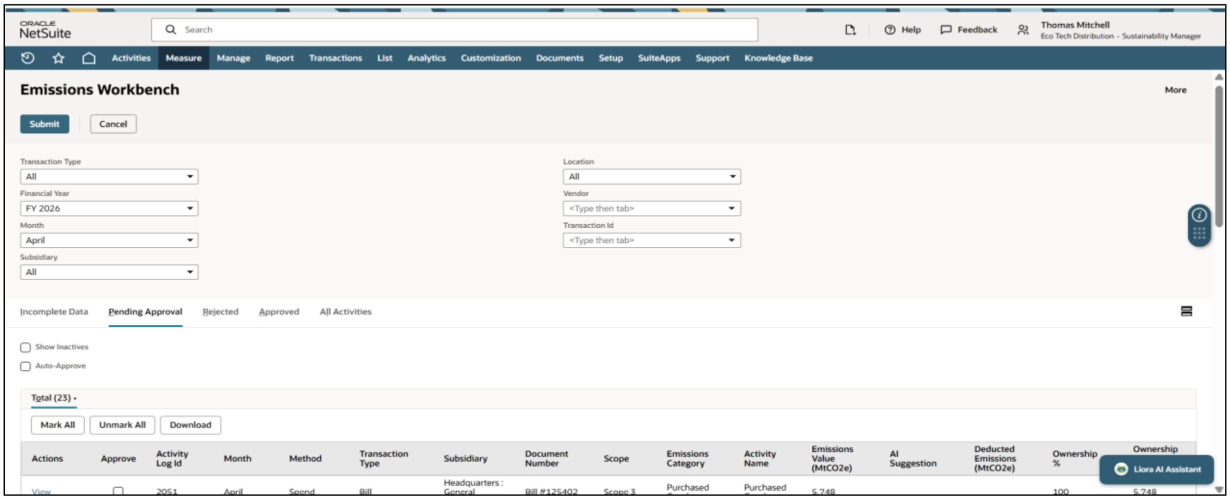
1. Login as **Sustainability Manager.** Go to **Measure > Monitor & Audit > Emissions Workbench**.
2. Select the **Transaction Type**, **Financial Year** and **Month** to filter emissions records for the required reporting period.
3. Select the **Subsidiary** and **Location** to refine the results further.
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 anapproval 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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Rejected
Approved
All Activities
Show Inactives
Auto-Approve
Total (23)
Mark All
Unmark All
Download
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
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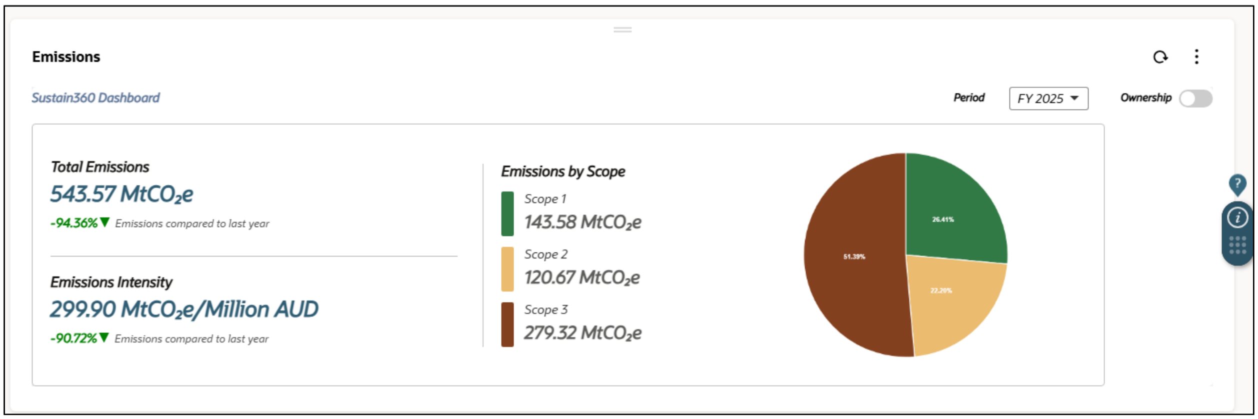
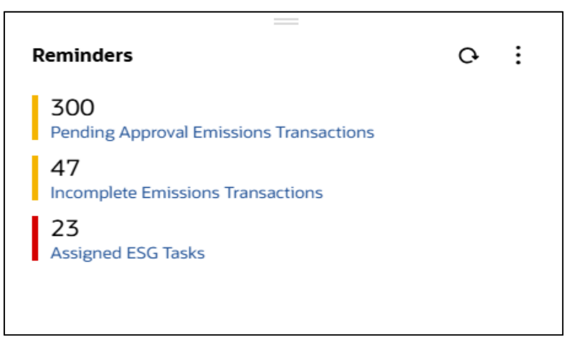
SuiteEarth

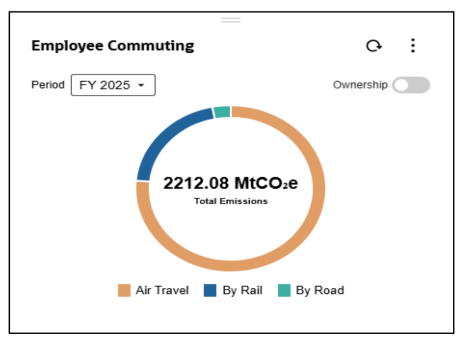
16. Emissions Dashboards

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.



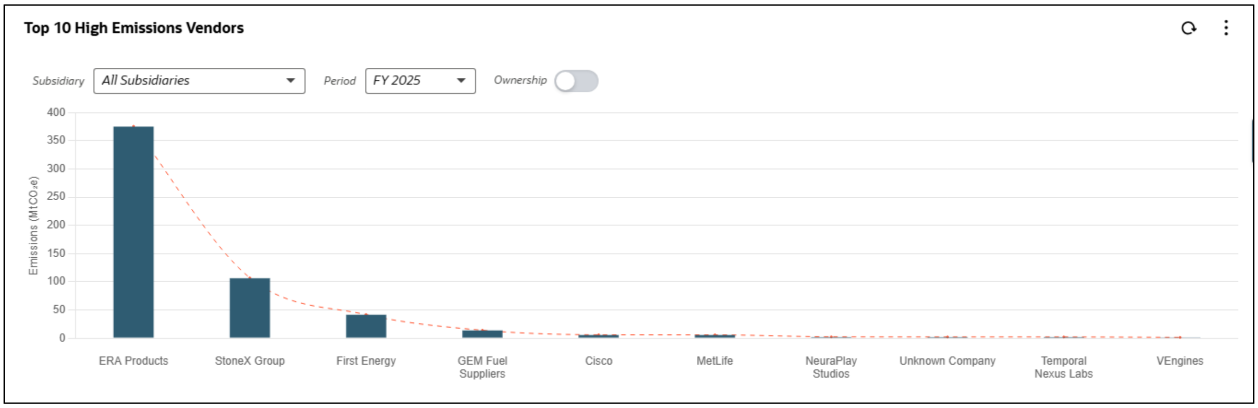
5. Use the **Period** filter or **Ownership** toggle to refine the displayed emissions based on reporting preferences.
6. Review the **Reminders** portlet to track items requiring action, such as Pending Approval Emissions Transactions, Incomplete Emissions Transactions and Assigned ESG Tasks.
7. Review 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.

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

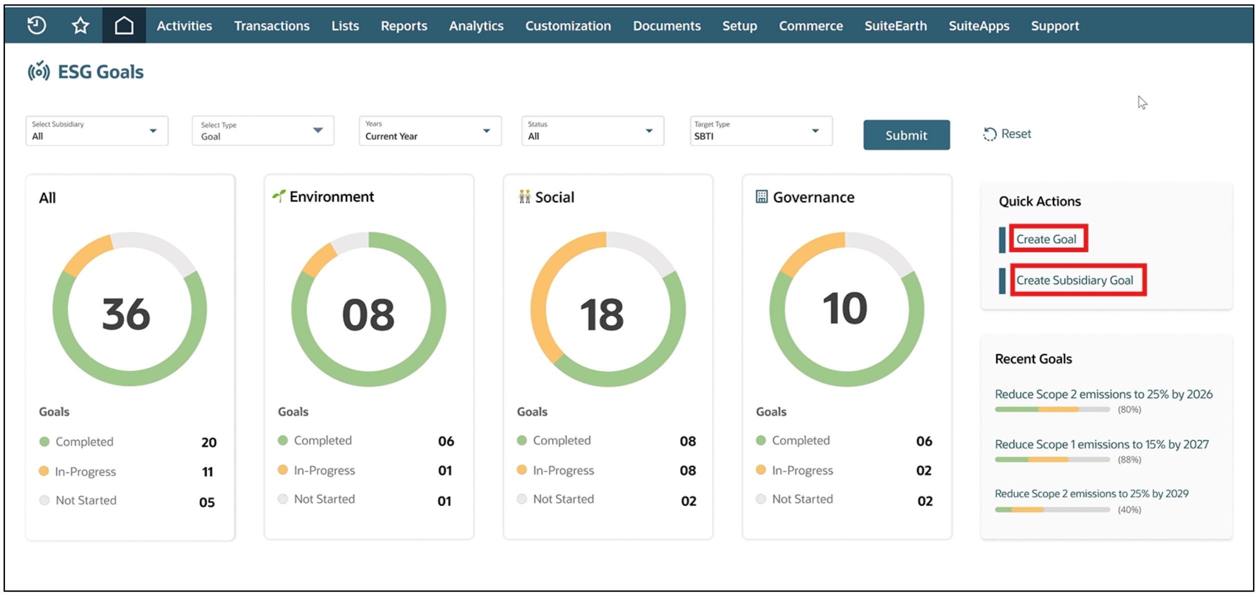


10. Use subsidiary, period and ownership filters to refine vendor emissions insights and compare contributions across entities.
11. Scroll within each portlet where available to view additional data bars, trend lines or summaries.
12. Select drill-down links on any emissions number or chart segment to open detailed transaction lists contributing to that metric.
13. 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.
14. Use the **Portlet date settings** to update the reporting period for all portlets simultaneously, ensuring the dashboard reflects the correct fiscal or custom period.
15. 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.



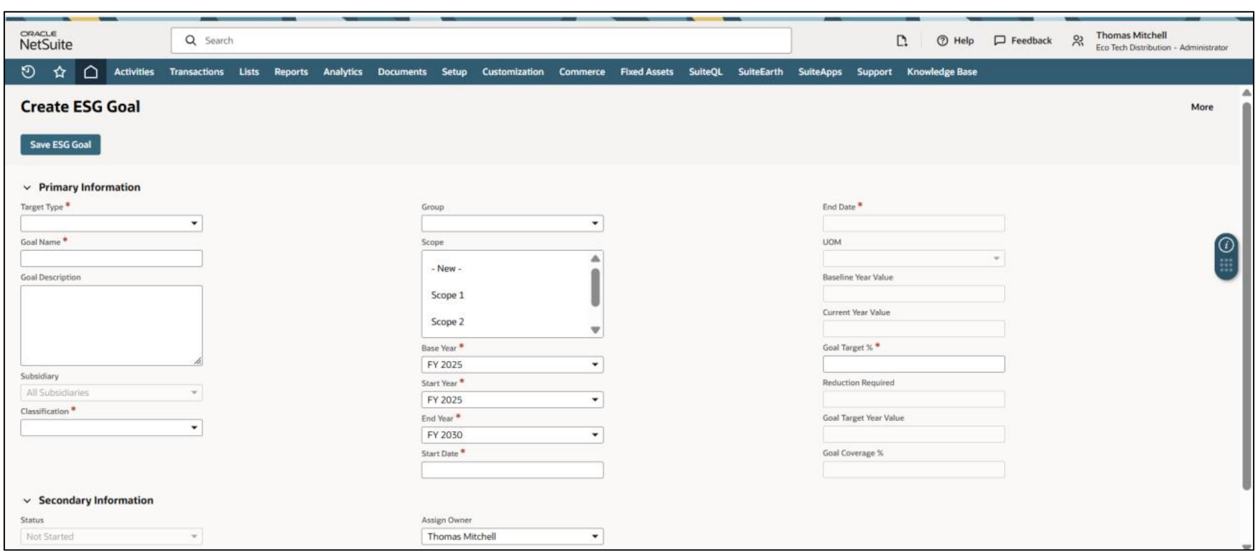
17.1 Goals

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.

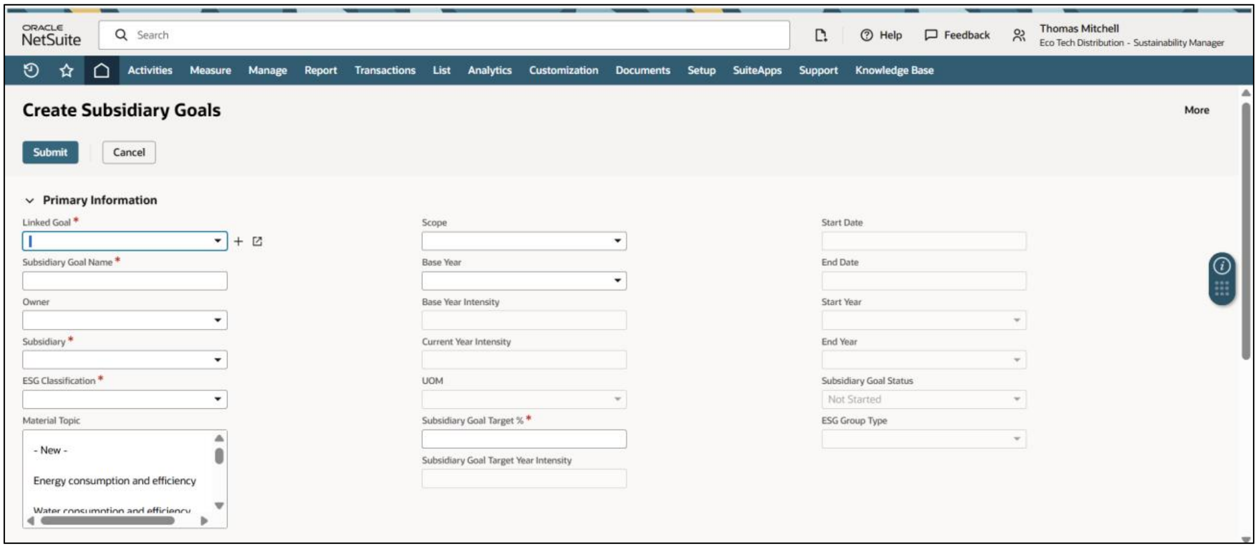
3. Select the **Company Type** to classify the applicable organization type.
4. Enter the **Goal Name** to identify the ESG target being established.
5. Enter the **Goal Description** with a detailed explanation of the objective, calculation methodology, assumptions, or reporting purpose. Review the 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.



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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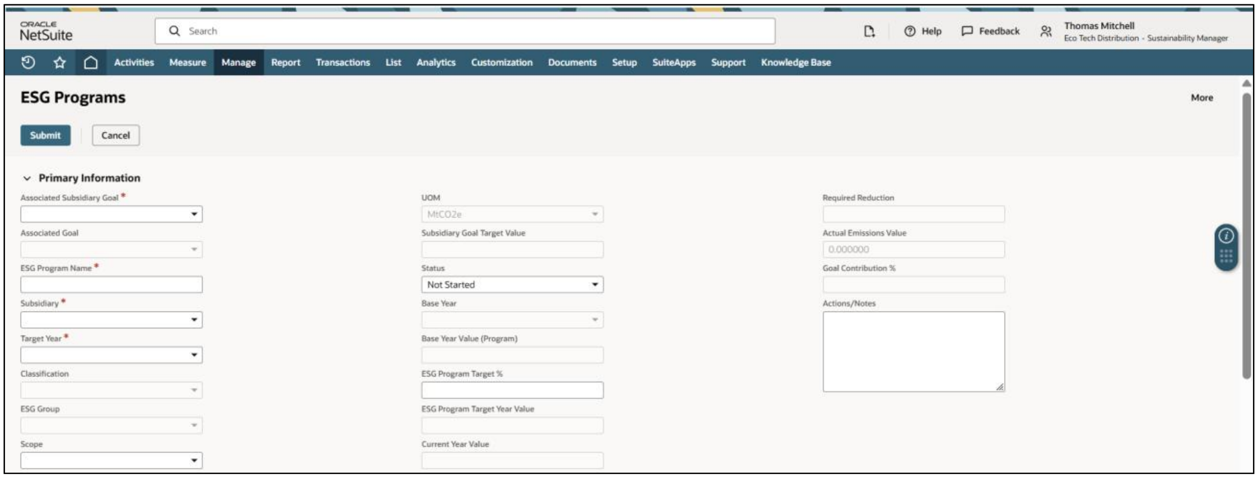
Owner
Subsidiary *
ESG Classification *
Material Topic
- New -
Energy consumption and efficiency
Scope
Base Year
Base Year Intensity
Current Year Intensity
UOM
Subsidiary Goal Target % *
Subsidiary Goal Target Year Intensity
Start Date
End Date
Start Year
End Year
Subsidiary Goal Status
Not Started
ESG Group Type

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
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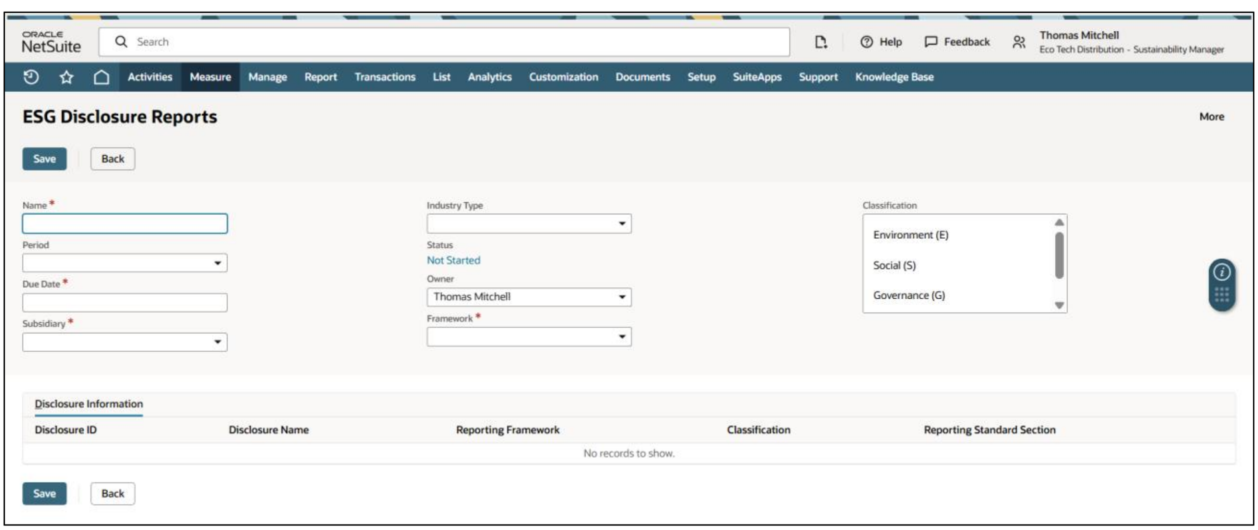
Classification
ESG Group
Scope
UOM
MtCO2e
Subsidiary Goal Target Value
Status
Not Started
Base Year
Base Year Value (Program)
ESG Program Target %
ESG Program Target Year Value
Current Year Value
Required Reduction
Actual Emissions Value
0.000000
Goal Contribution %
Actions/Notes

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.



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.