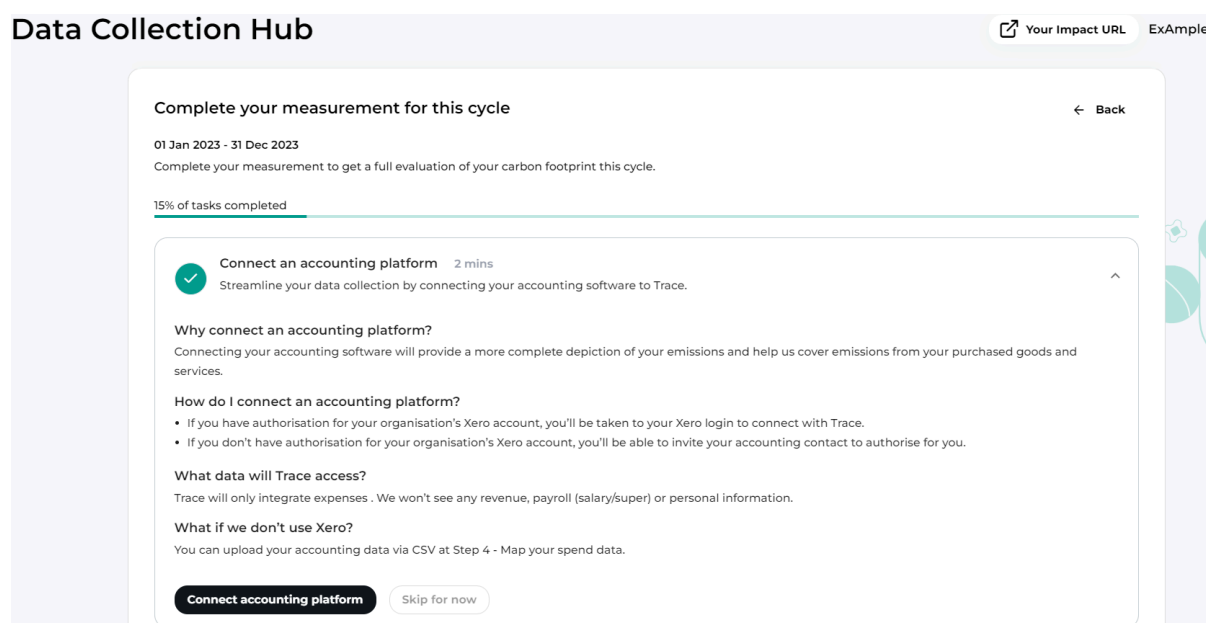


Getting started with Trace

Step One

Do you use Xero as your accounting software?

If so, then you can integrate your Xero account to provide spend data to cover GHG emissions from your purchased goods and services, and business travel.



The screenshot shows the 'Data Collection Hub' interface. At the top right, there are links for 'Your Impact URL' and 'ExAmpler'. The main heading is 'Complete your measurement for this cycle' with a 'Back' link. Below this, the measurement period is '01 Jan 2023 - 31 Dec 2023'. A progress bar indicates '15% of tasks completed'. The current task is 'Connect an accounting platform' (2 mins), which is marked with a green checkmark. The task description says: 'Streamline your data collection by connecting your accounting software to Trace.' Below this, there are sections for 'Why connect an accounting platform?' (explaining it provides a more complete depiction of emissions), 'How do I connect an accounting platform?' (listing steps for Xero login or invitation), 'What data will Trace access?' (stating only expenses are integrated), and 'What if we don't use Xero?' (mentioning CSV upload). At the bottom, there are two buttons: 'Connect accounting platform' and 'Skip for now'.

If not, that's totally ok!

Instead, please use our CSV upload feature to get your spend data into the app (this happens in Step Four). For the best results, please provide your expenses at the supplier level.

Further to the attached CSV template (in the email), here are some helpful tips:

A list of expected emissions sources from purchased goods and services/business travel:

- Business travel (flights, accommodation, car hire, taxi, public transport)
- Professional services (e.g. recruitment, consulting, legal, engineering etc)
- Food and beverages
- Repairs and maintenance
- Building services such as cleaning
- Banking and financial services
- Marketing and advertising
- Office equipment and supplies

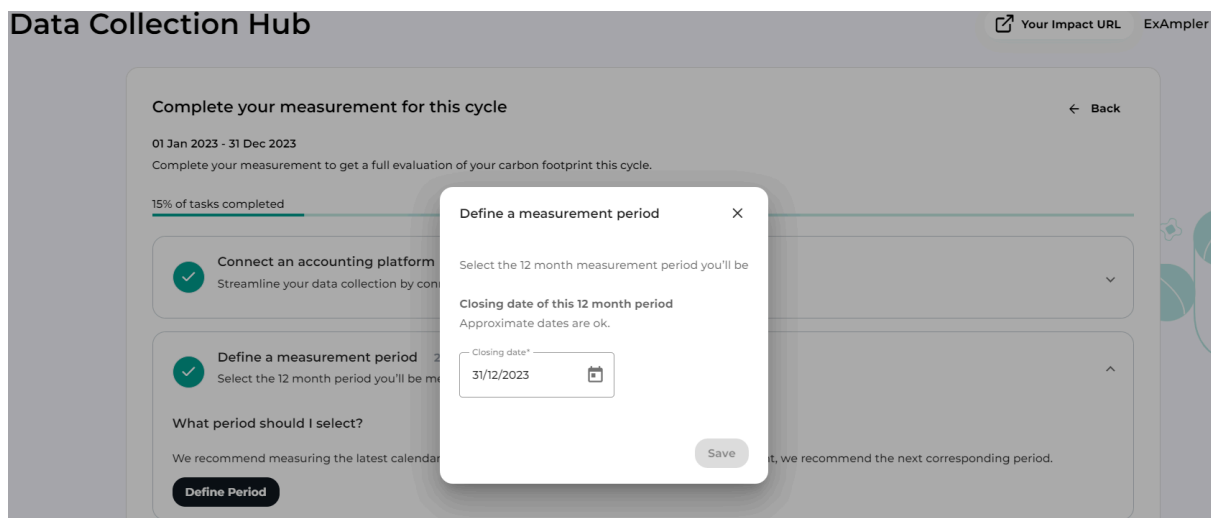
- ICT services and equipment (incl cloud services)
- Entertainment
- Products and materials
- Postage, courier and freight
- Clothing/uniforms
- Printing and publishing
- Contractors/labourers (not included in staff headcount on the location tab)

Formatting requirements for the CSV:

- Dates must be formatted as DD/MM/YYYY or YYYY/MM/DD
- Costs must be formatted as numbers, not currency (i.e. no commas)
- Each column must contain data, with no data gaps in the rows
- No additional data that the template doesn't specify

Step Two

Select your measurement period by choosing the last date of the 12-month period you wish to cover for your carbon assessment.



The screenshot shows the 'Data Collection Hub' interface. At the top, there's a header with 'Your Impact URL' and 'ExAmplifier'. The main content area is titled 'Complete your measurement for this cycle' with a 'Back' button. Below this, it shows the current cycle dates '01 Jan 2023 - 31 Dec 2023' and a progress bar indicating '15% of tasks completed'. There are two main tasks listed: 'Connect an accounting platform' and 'Define a measurement period'. The 'Define a measurement period' task is currently active, showing a dialog box with the title 'Define a measurement period'. The dialog box contains the text 'Select the 12 month measurement period you'll be measuring' and 'Closing date of this 12 month period'. Below this, it says 'Approximate dates are ok.' and shows a date picker with '31/12/2023' selected. There is a 'Save' button at the bottom right of the dialog box. The background of the interface is a light grey with a subtle pattern of green leaves.

Step Three

Share your staff survey with the team, OR request more information if you'd like to add this to your plan

Data Collection Hub

Your Impact URL

ExAmpler

Complete your measurement for this cycle

← Back

01 Jan 2023 - 31 Dec 2023

Complete your measurement to get a full evaluation of your carbon footprint this cycle.

15% of tasks completed

✓

Connect an accounting platform2 mins

Streamline your data collection by connecting your accounting software to Trace.

▼

✓

Define a measurement period2 mins

Select the 12 month period you'll be measuring emissions for.

▼

✓

Share your employee engagement survey2 mins

Involve your employees in the journey and measure their work-related emissions by sharing your survey.

▲

Get survey URL

The campaign will end in 3 months

Step Four

Add your Xero account as a data source, or upload your CSV data if you don't use Xero.

You will then need to "Map your Spend Data" to our emissions categories using the dropdown menus provided.

Once you click in to map your spend data, there is a short demo video available under "Helpful Tips". This exercise will cover the emissions from your **purchased goods and services**, as well as **business travel** if you don't have activity data for that.

← Back

11 accounts for ExAmpler UK

01 Jan 2023 - 31 Dec 2023

Helpful tips

Close

Just uncompleted

5 of 5

Marketing & Advertising

1 of 3

Legal

2 of 2

Consultant - Growth

3 of 3

Telecommunications

9 of 10

Office Expenses

6 of 6

Software

0 of 2

Raw Materials

0 of 3

Utilities

0 of 1

Freight

6 of 6

Travel - International

1 of 1

Accounting

Marketing & Advertising

Supplier name

Trace categories

All

5 suppliers found

<input type="checkbox"/>	Supplier Name	Spend ↓	Trace Category
<input type="checkbox"/>	Instagram	(AUD) 126,982.38	<div>Purchased goods & services - Marketing & advertising</div> <div>Digital advertisements</div>
<input type="checkbox"/>	Google	(AUD) 48,371.56	<div>Search...</div> <div>Purchased goods & services - Marketing & advertising</div> <div>Advertising & marketing agencies</div>
<input type="checkbox"/>	Jet Marketing Agency	(AUD) 38,247.34	Digital advertisements
<input type="checkbox"/>	SEO Services	(AUD) 18,402.27	Market research
<input type="checkbox"/>	Mia Photography	(AUD) 1,672.35	Printing & publishing

Items per page: 101 - 5 of 5

Step Five

Once your spend data has been mapped, close that screen and click through to "Add your Activity Data".

Activity data (L, kWh, km etc) will cover emissions from your office **utilities** and **WFH energy** (on the Location tab), **employee commute** (on the Commute tab), **business travel*** (on the Travel tab), **fuel use** in company vehicles (on the Fuel tab) and **office waste** (on the Waste tab).

*Please provide **either** activity data or spend data for business travel, not both.

Step Six

Just kidding, there is no step six - you're done! Congratulations 🎉 - feel free to do a little victory dance before hitting **submit!**

Someone from our team will review your data and reach out with information on how to view your measurement breakdown, kickstart your decarbonisation plan, share your journey, and even offset your footprint if that's something you're interested in doing.