FSC Trace

User Guide

Demonstrate the product creation, adding trading partner and recording purchase transaction of a COC user in FSC Trace.

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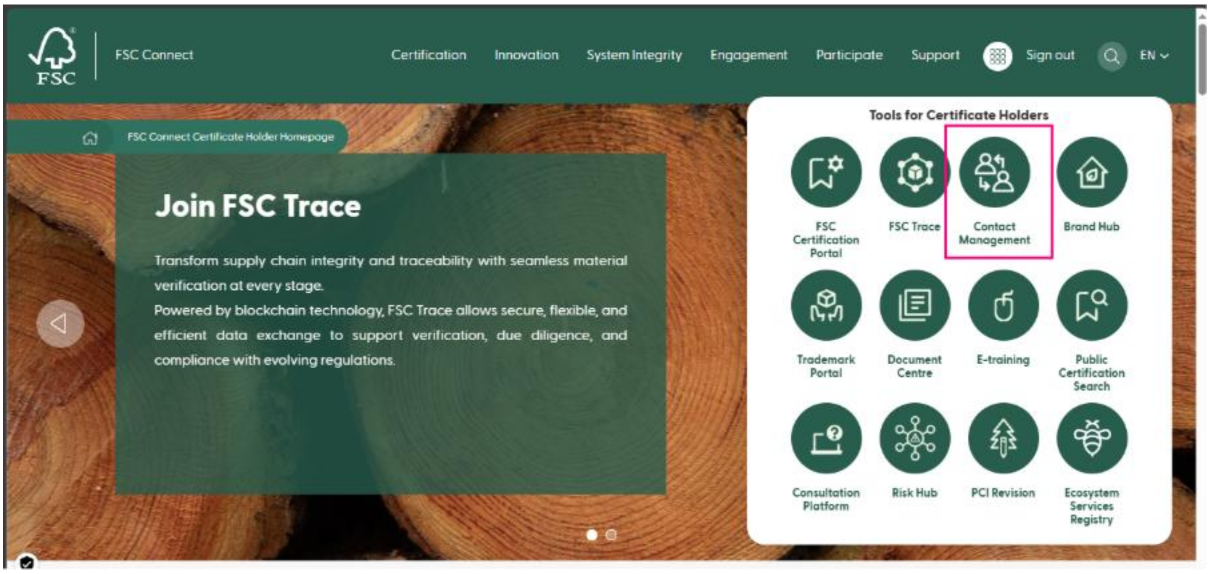
Contact Management

Only a Primary Contact who has access to both the FSC Certification Portal and FSC Trace can access Contact Management.

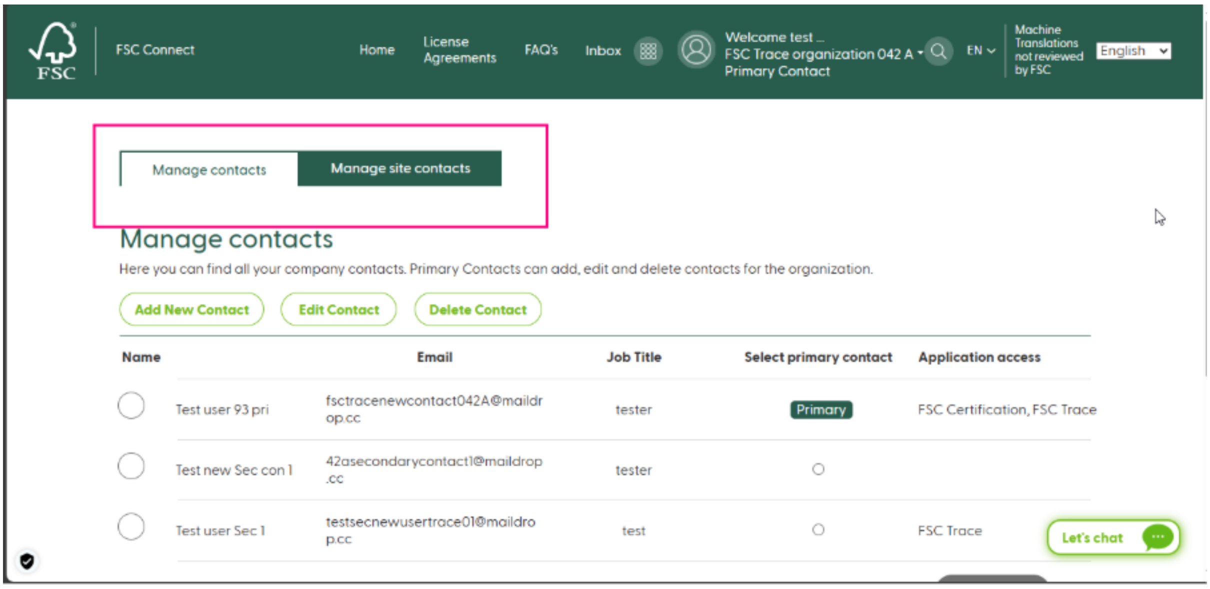
<u>Note</u>: They can only add secondary contacts and grant FSC Trace access to their organization and their site organizations.

- Sign in to **FSC Connect** and navigate to **Contact Management**.



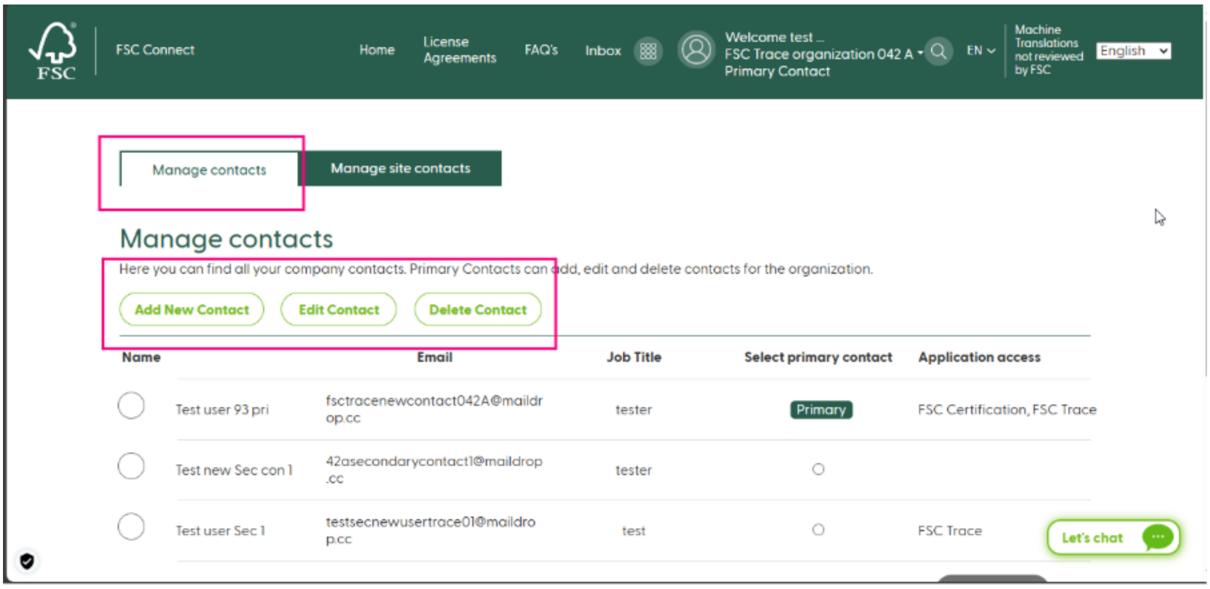
- Based on the **certificate type** mapped to the user:
    - If the user is mapped to a **Group/Multisite Certificate**, both Manage Contacts and Manage Site Contacts tabs will be visible.

*<u>Note:</u> If the user is mapped to a **Single Certificate**, only the Manage Contacts tab will be displayed.*



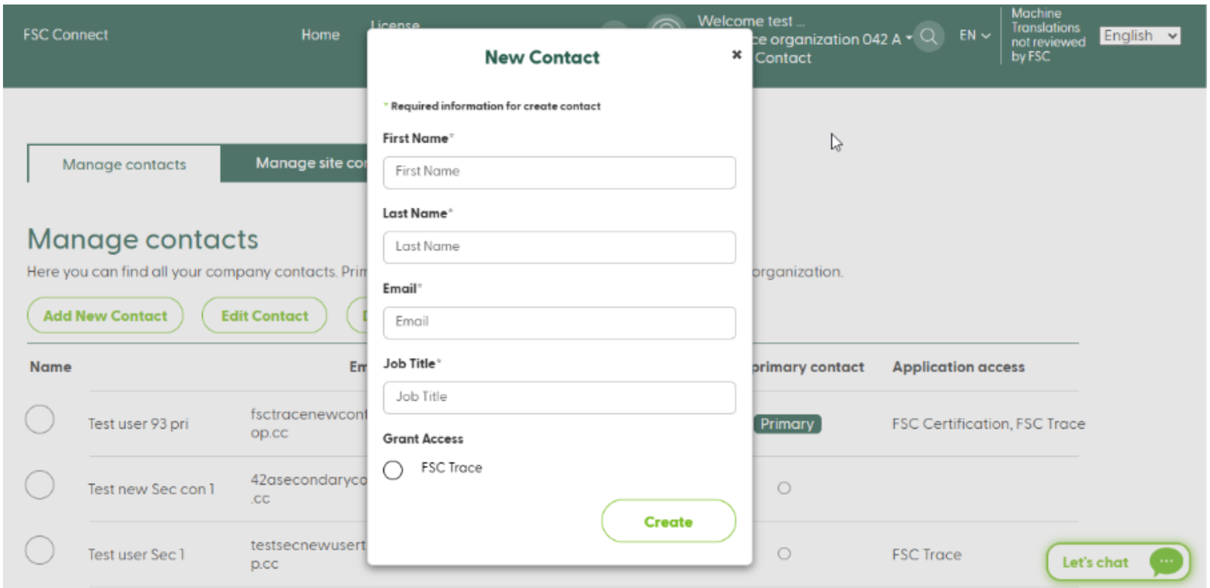
Adding/Inviting User

Inside the **Manage Contacts** tab, users can add secondary contacts to their organization.



- **Add New Contact**
  - Click "Add New contact" option
  - Provide the following mandatory details:
    - First Name
    - Last Name
    - Email ID
    - Job Designation
  - In the **Grant Access** section, enable **FSC Trace** access.

- Once after the record is saved, an invitation email will be triggered to the contact, allowing them to activate and log in to FSC Trace under the same organization.



- **Edit Existing Contact**
    - Select any existing secondary contact from the list and click **Edit Contact**.
    - In the **Grant Access** section, enable FSC Trace access.
    - Once after the record is saved, an invitation email will be triggered to the contact, and they can activate and log in to FSC Trace for the same organization.

Adding/Inviting User: Site Organization

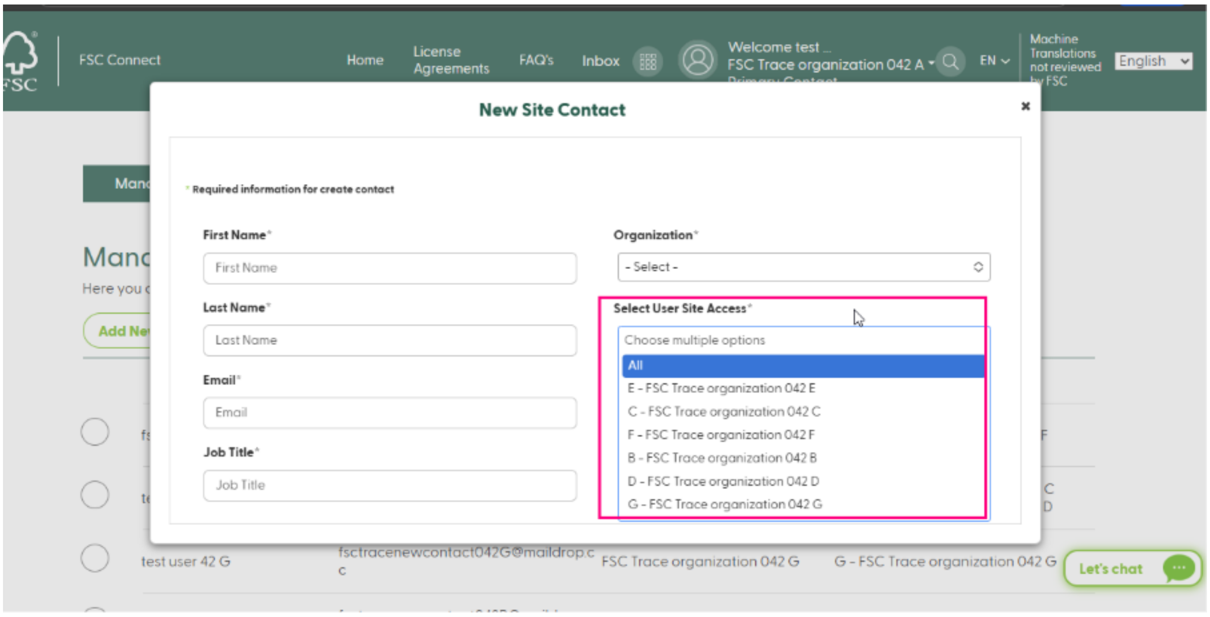
In the Manage Site Contacts tab, users can add secondary contacts to their Site organizations.

<u>Note:</u> *The site organization must already be invited to FSC Trace (either via Dynamics or the Trace application). Only then will it appear in the Site Access list and the Organization dropdown.*

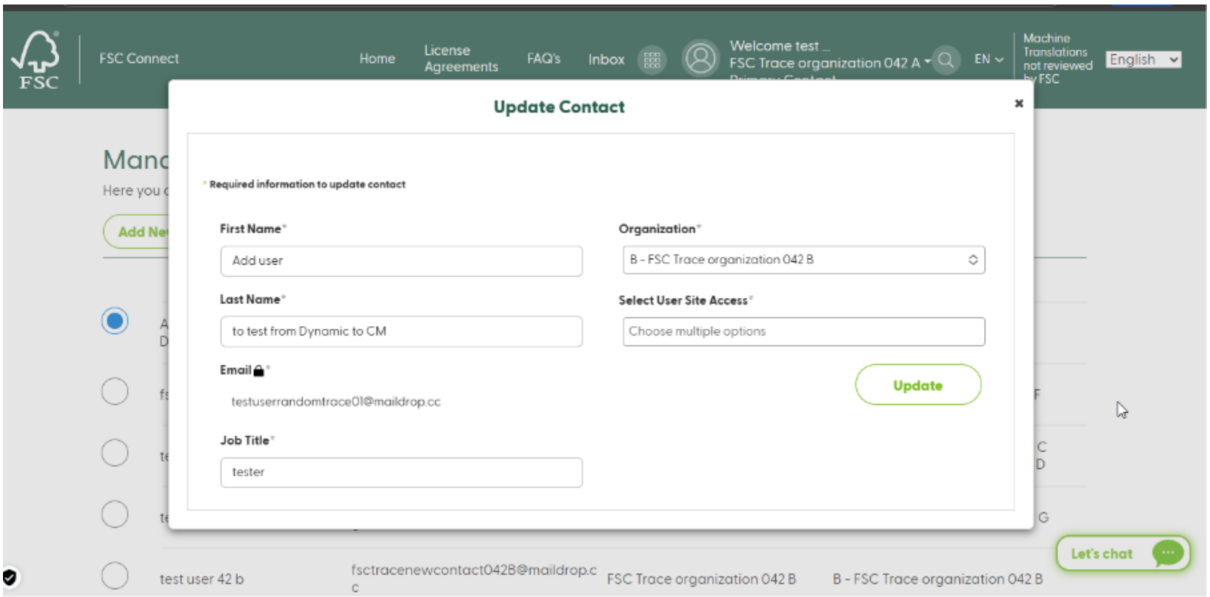
- **Add New Contact**
    - Click "Add New Contact" option
    - Provide the following mandatory details:
        - First Name
        - Last Name

- Email ID
- Job Designation
- Organization
- Site access (multiple site selections are allowed)

  - Once the record is saved, an invitation email will be sent to the contact. They can then activate their account and log in to FSC Trace under the selected organization.



- **Edit Existing Contact**
  - Select any existing secondary contact from the list and click Edit Contact.
  - Choose the Organization and update the Site Access as needed.
  - After saving the record, an invitation email will be triggered, allowing the user to activate and log in to FSC Trace for the respective organization.


FSC Connect
Home
License Agreements
FAQ's
Inbox
Welcome test ...
FSC Trace organization 042 A
EN
Machine Translations not reviewed by FSC
English
Update Contact
* Required information to update contact
First Name*
Add user
Last Name*
to test from Dynamic to CM
Email*
testuserrandomtrace01@maildrop.cc
Job Title*
tester
Organization*
B - FSC Trace organization 042 B
Select User Site Access*
Choose multiple options
Update
test user 42 b
fsctracenewcontact042B@maildrop.cc
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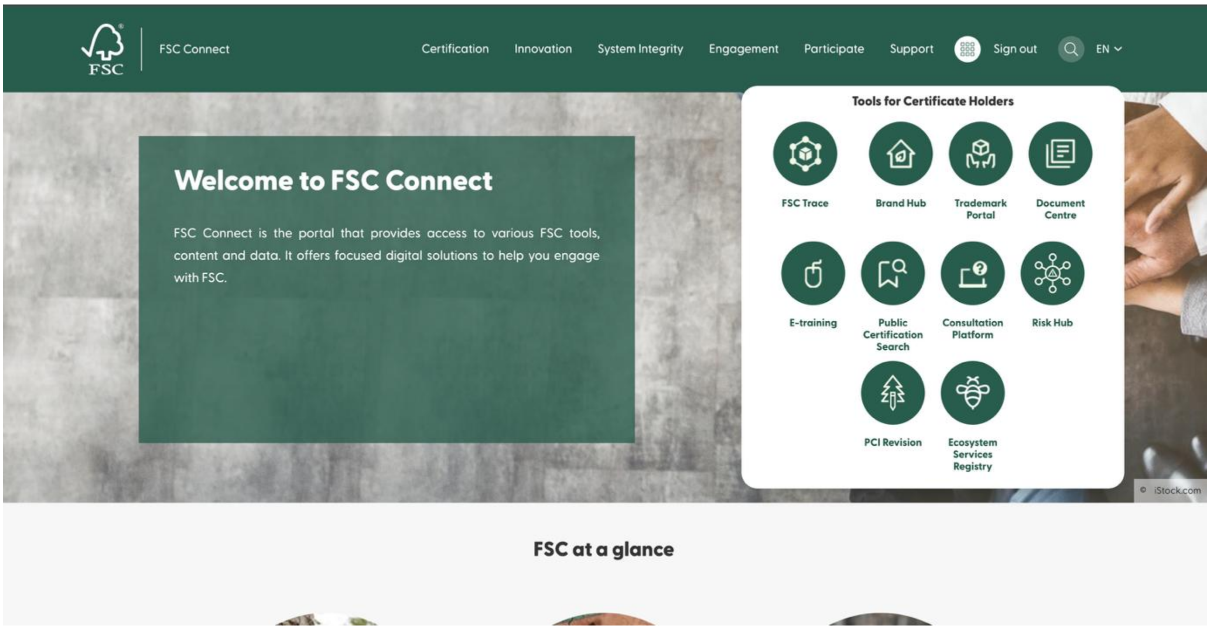
Let's chat

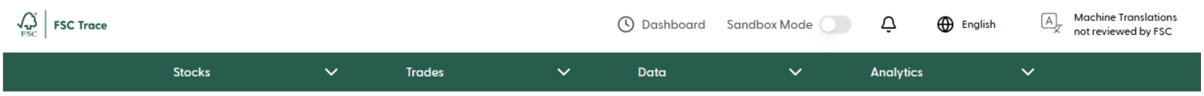
FSC Trace

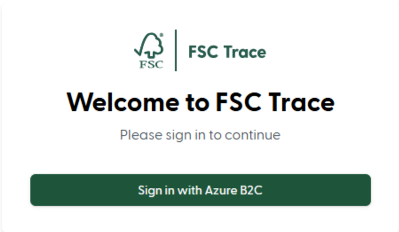
Sign-in

The FSC Trace platform can be accessed via the FSC Trace button under the Tools app pallet on FSC Connect.



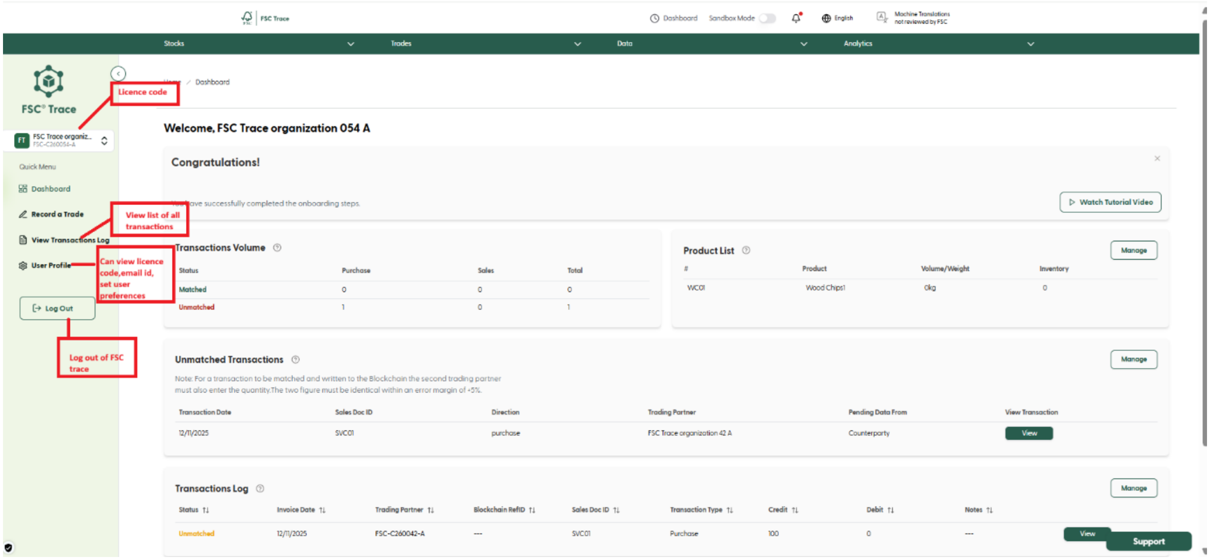
There will be an option to login specific organizations in case of group/multisite organization.





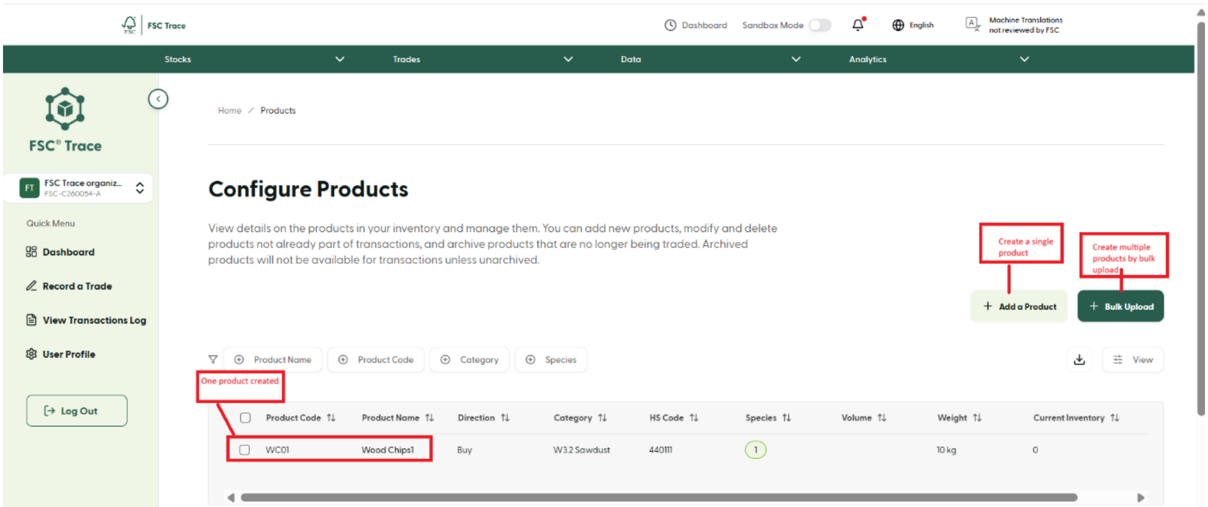
Dashboard

- After logging into FSC Trace, we will be landing on the dashboard screen.
- The dashboard contains information of the transactions and products.



Configure Products

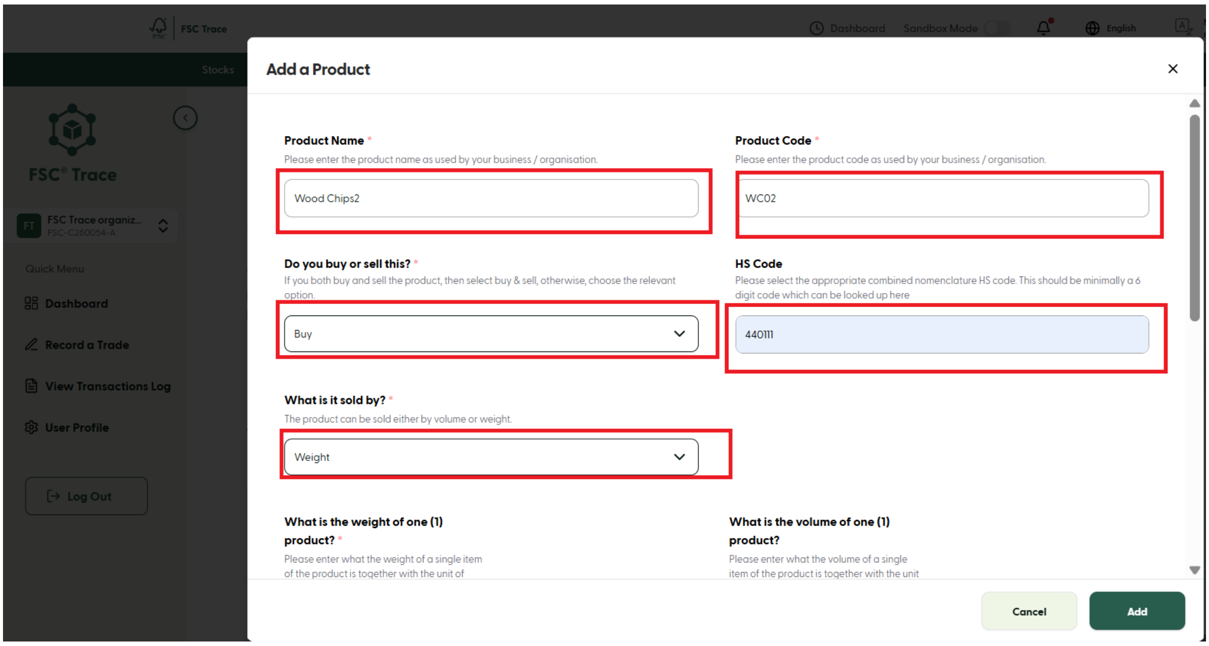
To add information about the products, navigate to Stocks > Configure Products to create new products.



<u>Note:</u> Three are two methods to add products in FSC Trace.

Single Product Creation

- By clicking on "Add a product" button to create a single product at a time.
- After clicking the button "Add a product," a pop up screen will open.
- The relevant information has to be added in the system like Product Name, Product Code, Trading Direction, HS Code, Product Category, Weight, Volume and Quantity.
- Once the new product is saved it will be available in the list and also to use.



Bulk Product Creation

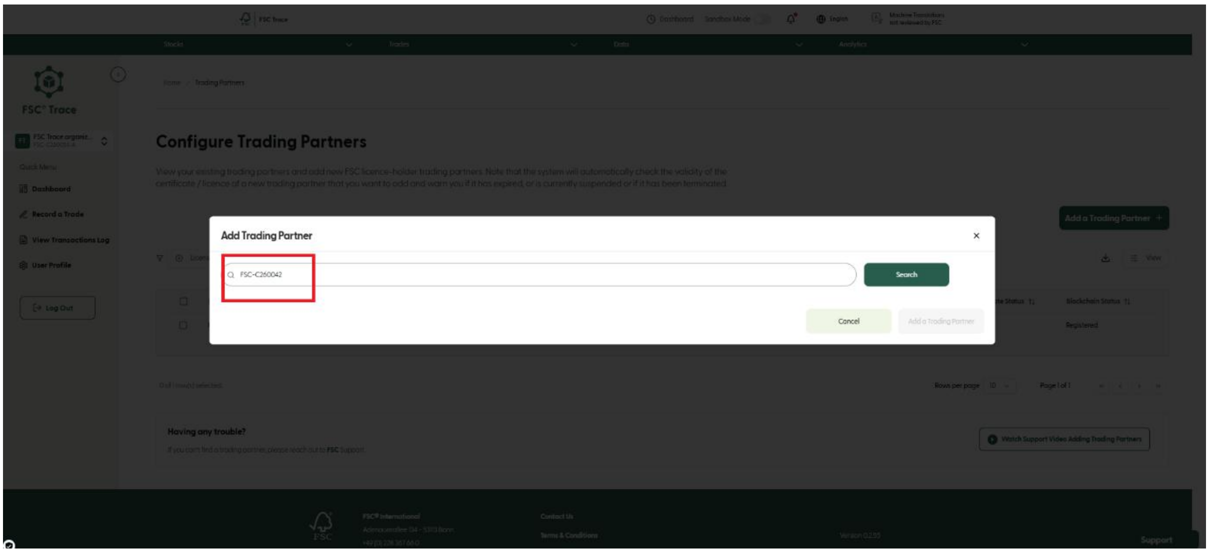
- Click the "Bulk Upload" button to create multiple products at a time by uploading data in an Excel template.
- The template can also be downloaded from FSC Trace.
- Once the template is filled, all the required information is added, and the file is uploaded, the product will be available in the list.

Trading Partners

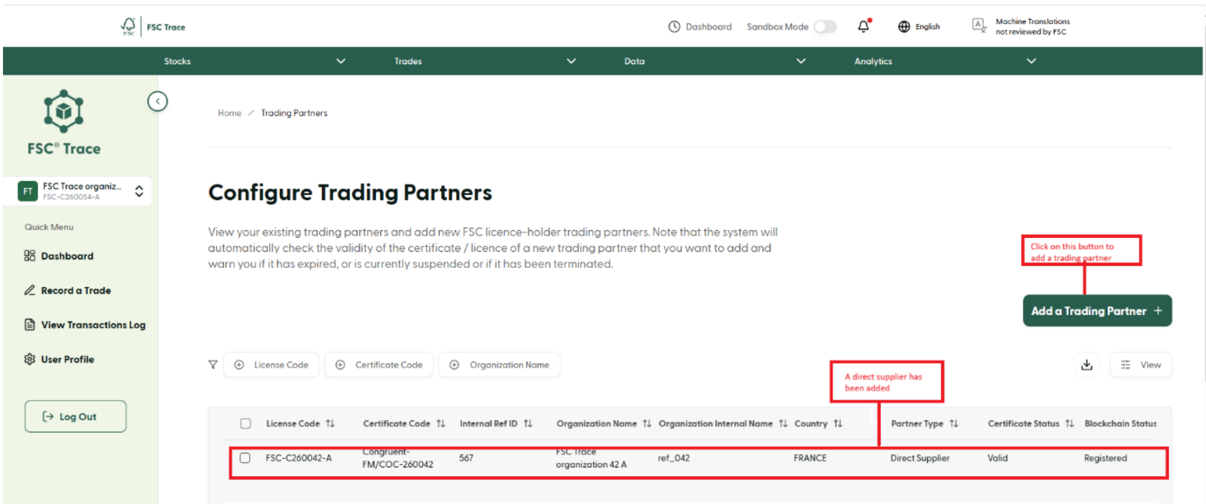
To add information about the trading partners, navigate to Trades > Configure Trading Partners to create a trading partner.

Add Trading Partner

- Trading partner can be added by clicking on “Add a Trading Partner button”.
- A pop up will open where a search bar is present.
- A trading partner can be searched by entering valid licence code, certificate code and organization name.
- The search will retrieve the results and specific trading partners can be added.



- The newly added trading partner will be available in the list.



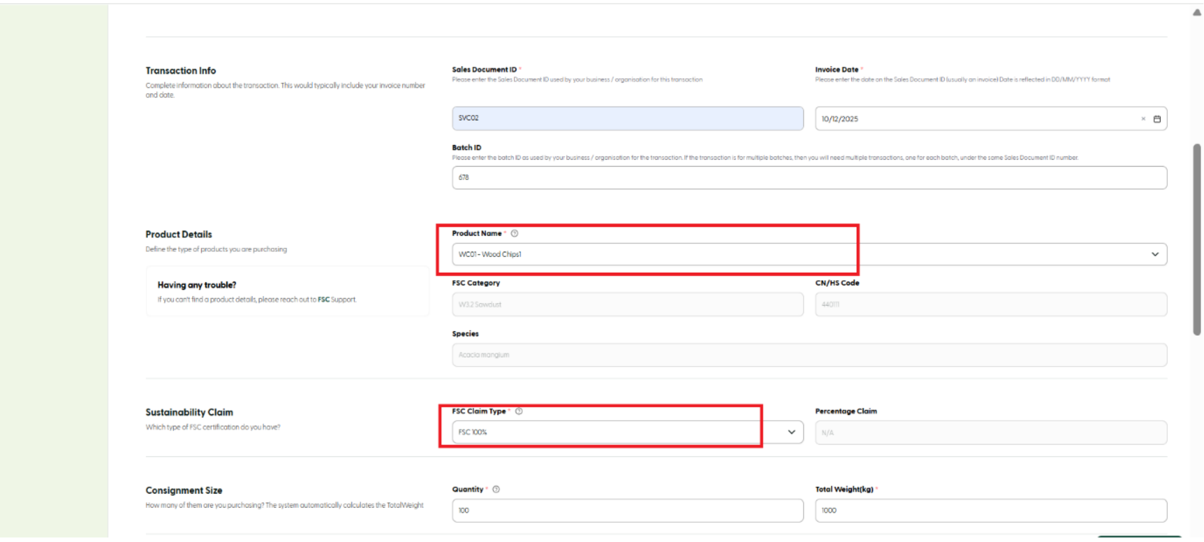
<u>Note:</u> *Already added trading partners can’t be added again.*

Transactions

There are two types of transactions in FSC Trace: Purchase and Sale.

Transaction Creation

- Trading partner has to be selected to create a transaction as a counterparty.
- All the mandatory fields are required to create both sale and purchase transactions.



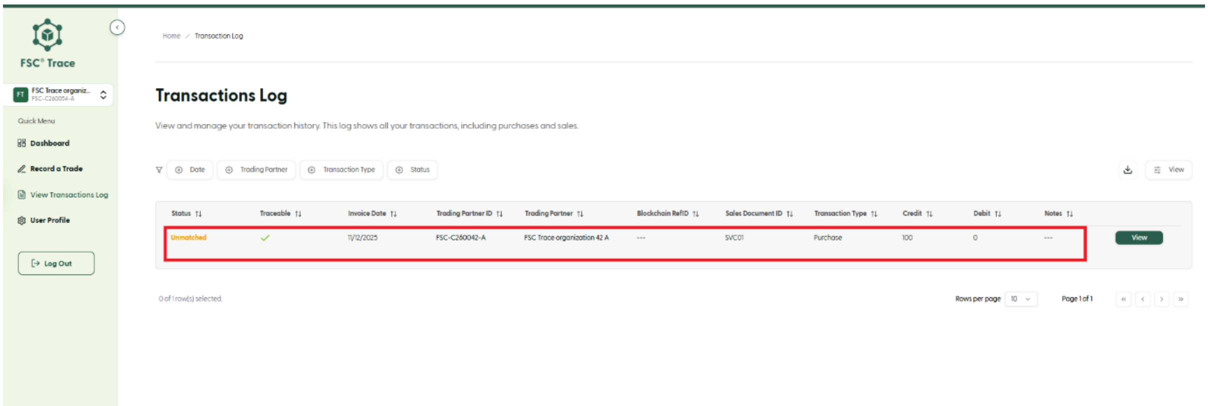
- Submitting to EUDR is optional and checking this will make this transaction available in the EUDR section of FSC Trace.

<u>Note:</u>

- *The transactions can be created in both single and bulk method.*
- *The transaction is available for both parties and counterparty has to match.*
- *For the bulk transaction creation, both parties have to upload files and the transactions are matched automatically without creating duplicate transactions.*
- *The template can be downloaded from FSC Trace.*

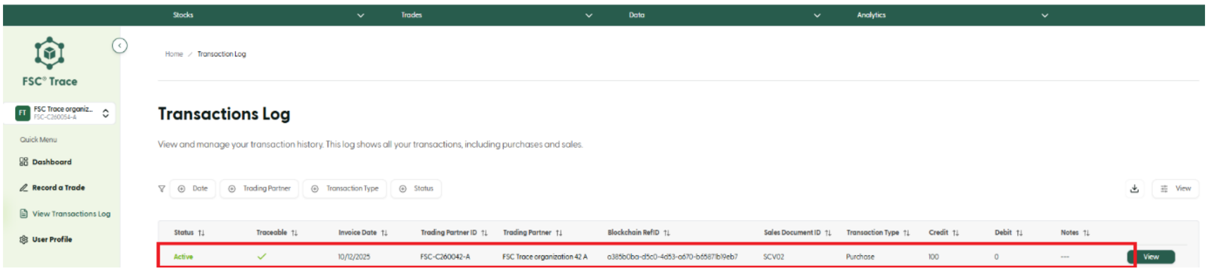
Transaction Matching

The newly created transaction will be available in the transaction log.



*<u>Note:</u> All transactions are created by default as "**unmatched**" and it will remain unmatched unless the transaction is matched by a counterparty sale transaction.*

If the transaction is matched by a counterparty, the transaction is matched and status is shown as "**active**".



<u>Note:</u>

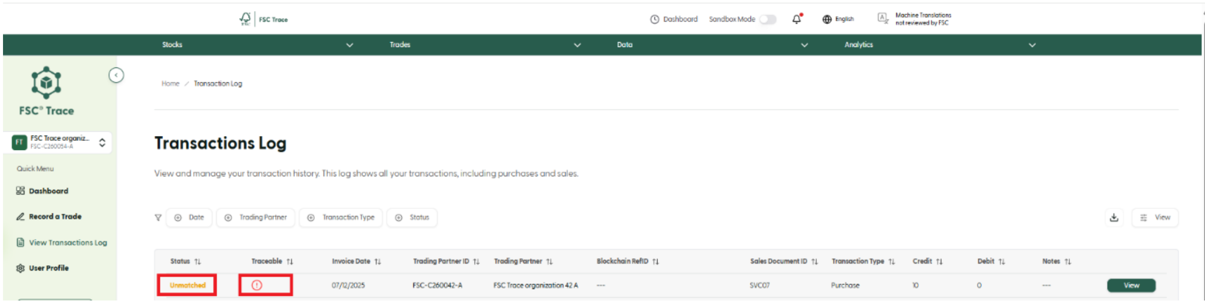
- *The product inventory will only get updated once the transaction is successfully matched.*
- *There is 5% variance in terms of adjusting the transaction. If we input total weight value greater than 5% or less than 5%, the transaction cannot be matched and remains unmatched and shows error "Weight/Volume difference exceeds 5%".*

Discontinuous Transactions

Users can choose to use FSC Trace flexibly, even if not every part of your supply chain is on the platform.

While recording a purchase transaction, check the discontinuous purchase checkbox, then the harvesting block becomes visible and the transaction can be submitted.

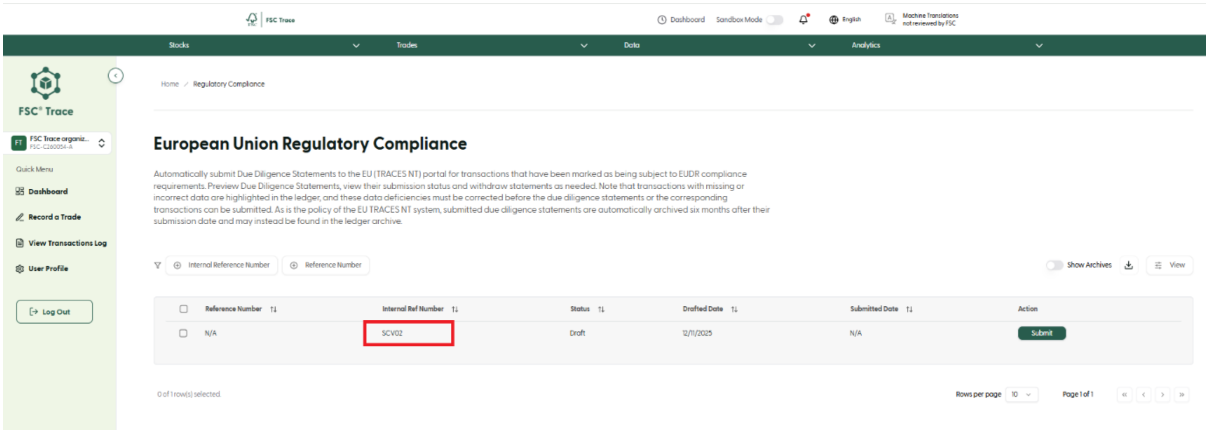
- Once the discontinuous transaction is created, there is no counterparty and the transaction remains unmatched in the transaction log.
- A red exclamation mark is shown beside transaction status.
- The inventory is automatically updated.



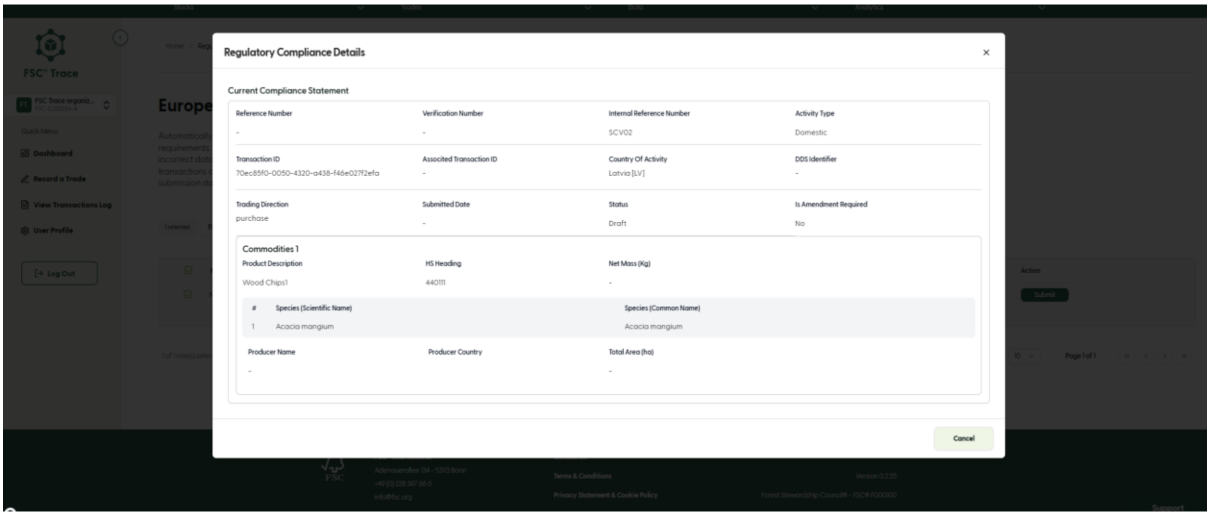
<u>Note:</u> The difference for discontinuous transactions is that the matching by the counterparty is not required to update inventory.

EUDR

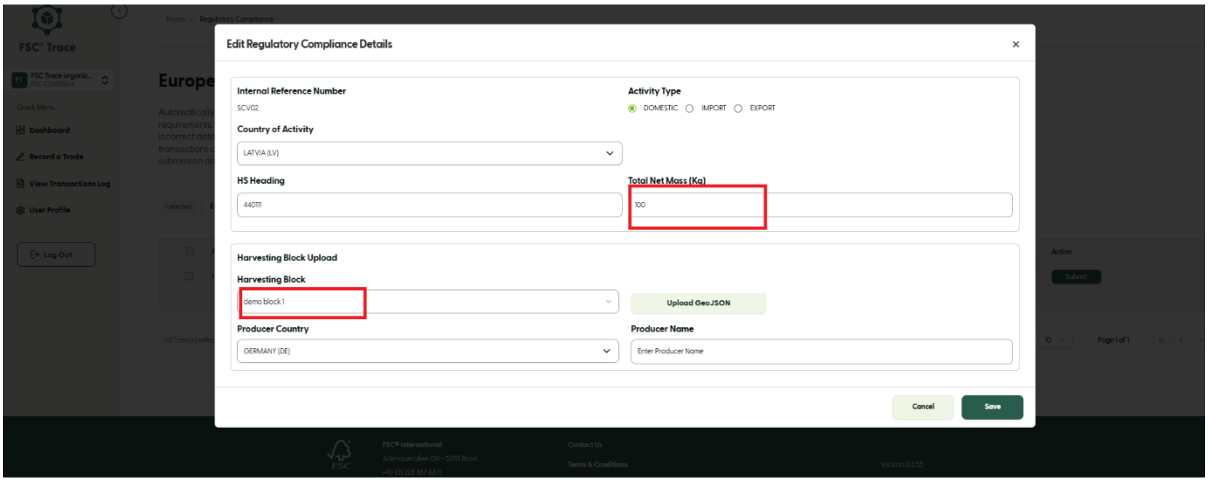
After the transaction is matched, the Draft record will be created and listed in the DDS Ledger page (Navigation: “Analytics > Regulatory compliance > European Union”. To ensure the transaction sales document ID will be displayed as Internal reference number of the DDS record)



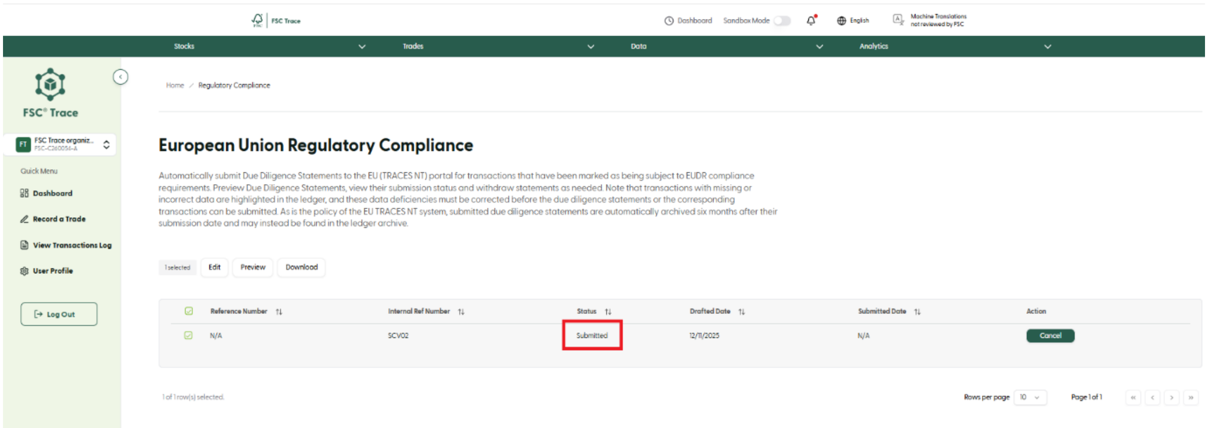
Select the DDS record and Preview the details pulled from submitted transaction.



Select the record, navigate to the Edit screen, and enter the missing details.



After filling in all mandatory details, submit the DDS record. Once submitted, it will appear in the EUDR Platform.

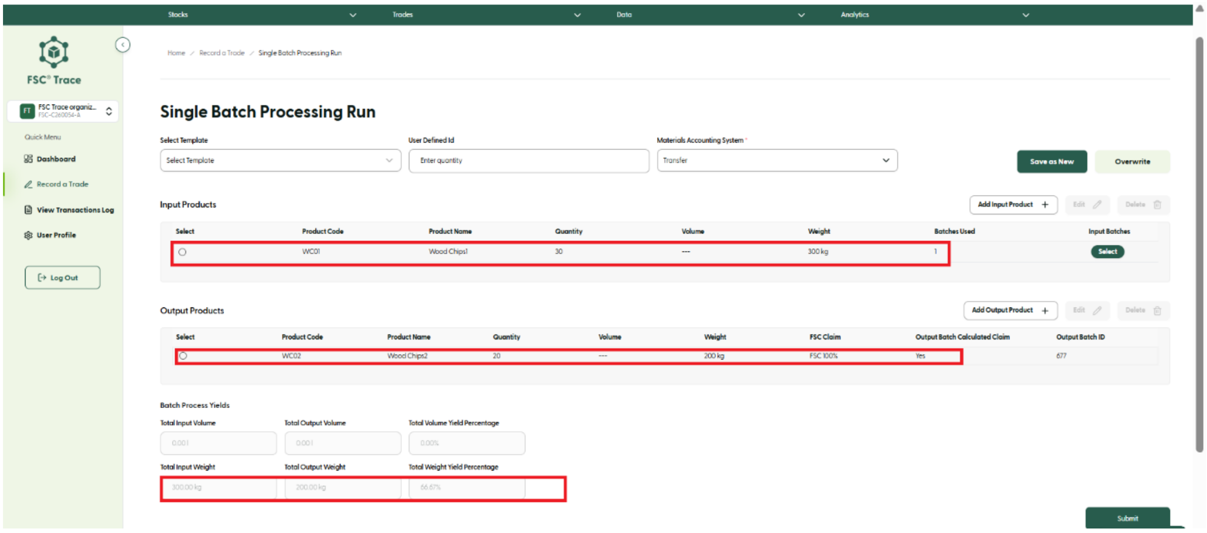


<u>Note:</u> "Reference number" will be returned by the EUDR.

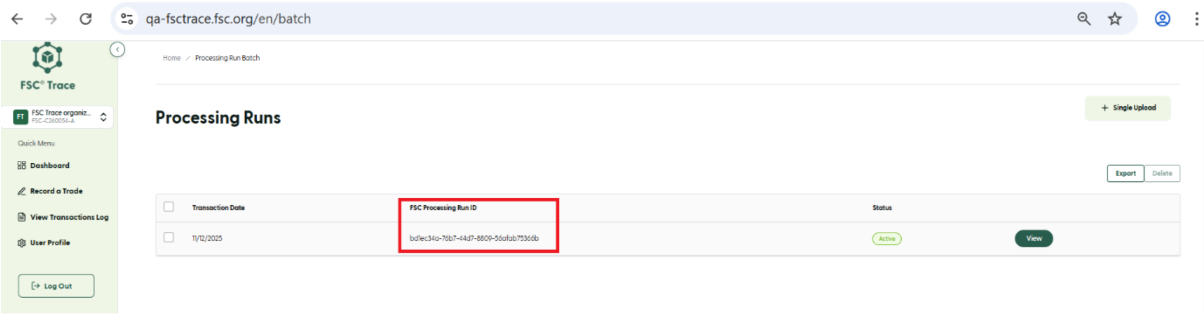
Processing Run(s)

The purpose is to create new products by combining multiple products in a form of inputs and outputs with different proportions. The option can be accessed via Navigate to Trades > Processing Run batch.

Processing batch run is completed and available in the processing run page when all the input product(s) and output(s) combinations are successfully added and batch is submitted.

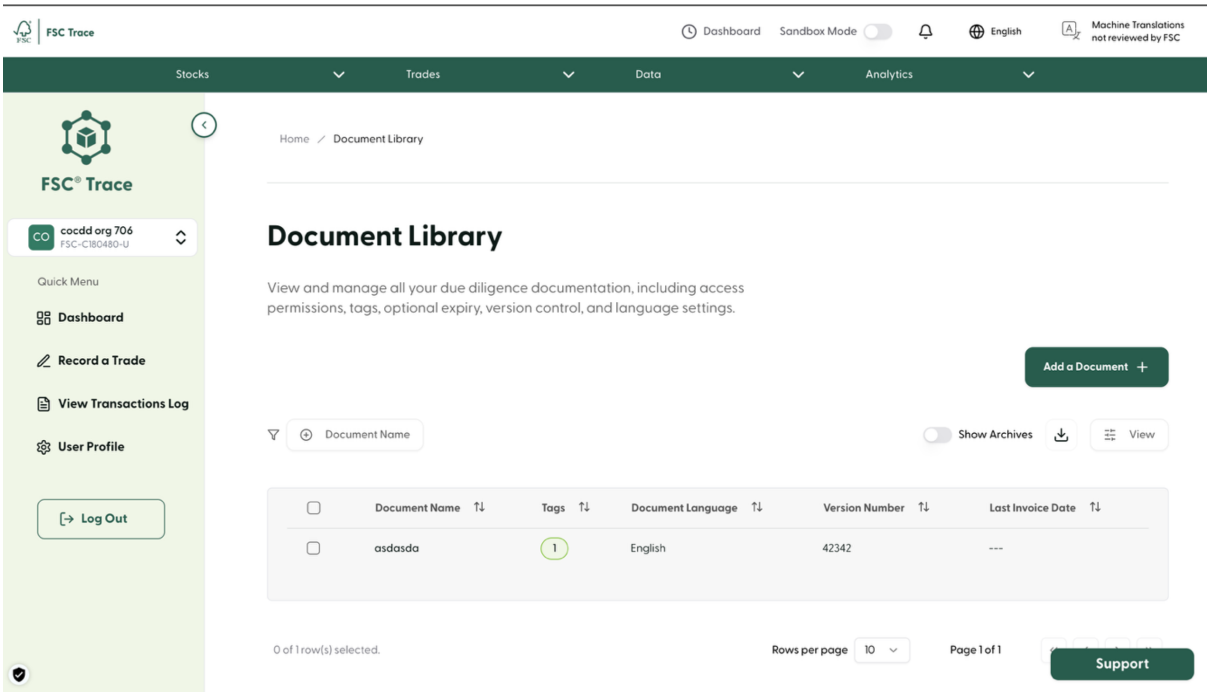


After submission, inventory of the sell product is increased and inventory of buy product is decreased.



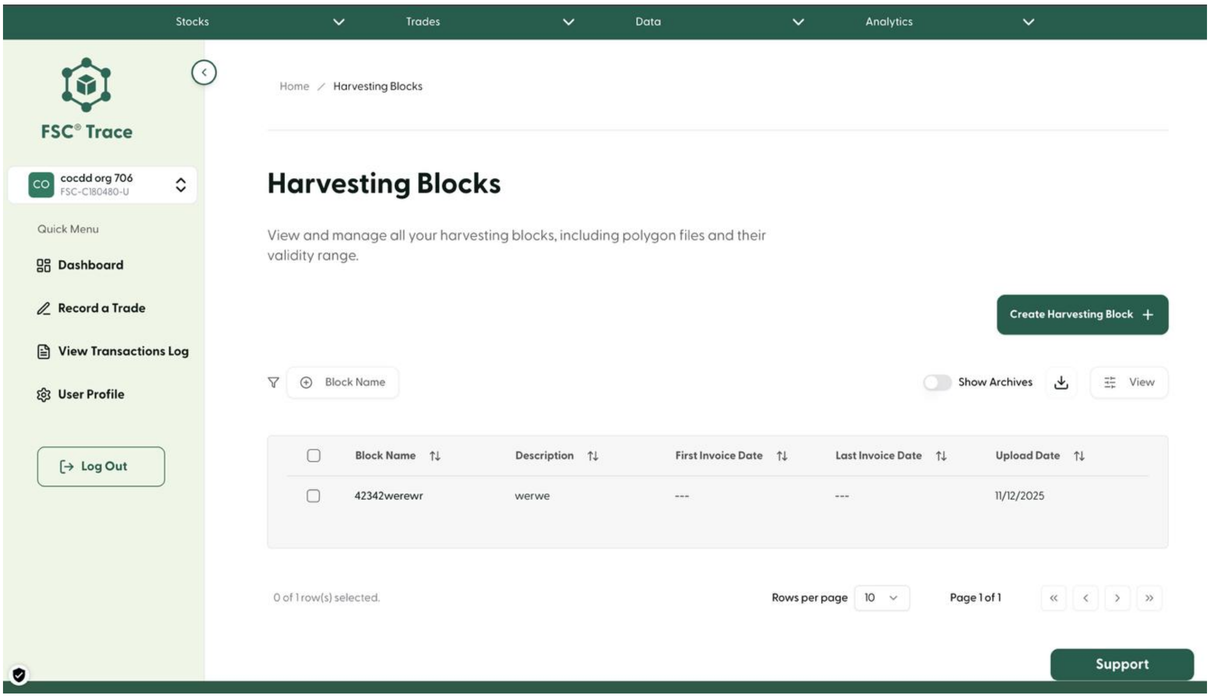
Document Library

The documents can be stored within Trace and then can be reused easily (attaching) to transactions.



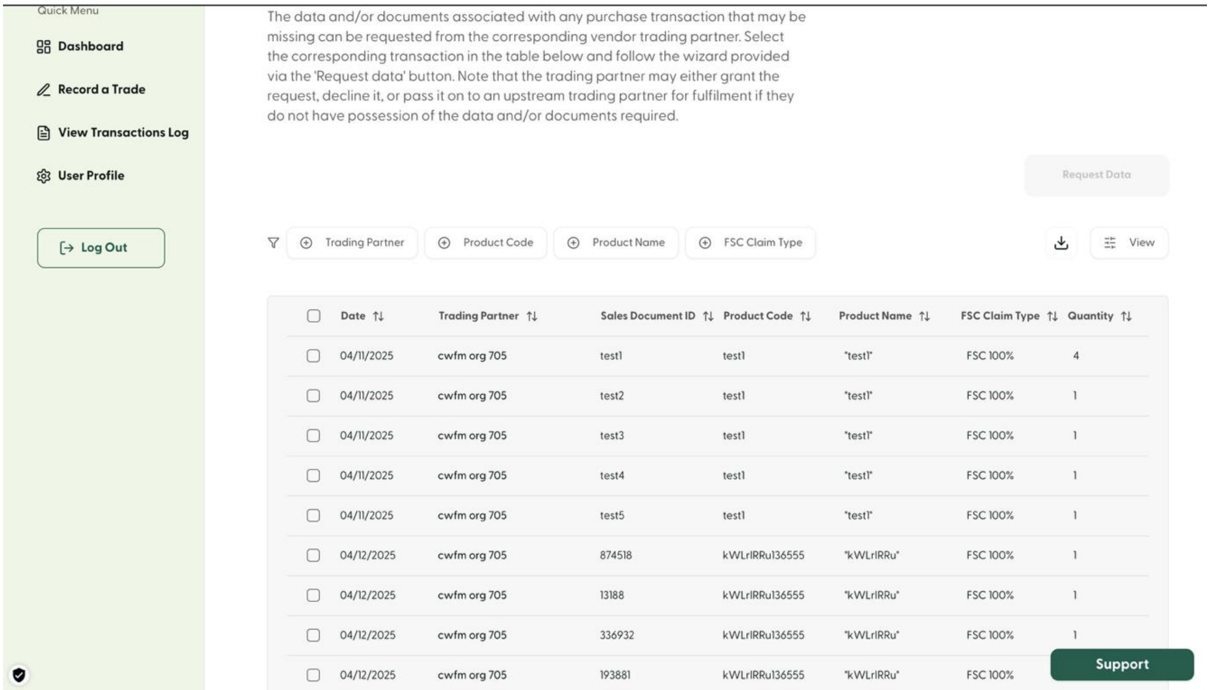
Harvesting Blocks

The harvesting blocks can be stored within Trace and then can be reused easily (attaching) to transactions.



Data Sharing

It is possible in FSC Trace to request and share data with trading partners. There is also the possibility to manage access and sharing permissions.



Setting(s)

The setting(s) can be accessed from the left panel of FSC Trace. There are settings related to:

- User preferences
    - Date and Time
    - Weight, Volume, Preferred Unit
- EUDR
    - Username
    - API Key
- Onboarding
    - Onboarding content

<u>Note:</u> For the two sections, there will be redirect to main pages.

- *Product and Trading Partners*
- *Data Sharing*