Version 1.3
April 2022

For further information on the SBP certification system and to view the full set of documentation see www.sbp-cert.org

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In the case of inconsistency between translations, the official English language version shall always take precedence.

SBP welcomes comments and suggestions for changes, revisions and/or clarifications on all of its Standards documentation. Please contact: info@sbp-cert.org

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## Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Title</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Background</td>
<td>1</td>
</tr>
<tr>
<td>2</td>
<td>Getting Started with the DTS 2.0</td>
<td>2</td>
</tr>
<tr>
<td>2.1</td>
<td>Accessing DTS 2.0</td>
<td>2</td>
</tr>
<tr>
<td>2.2</td>
<td>Home page layout and menu items</td>
<td>4</td>
</tr>
<tr>
<td>2.3</td>
<td>Managing and adding internal users</td>
<td>5</td>
</tr>
<tr>
<td>3</td>
<td>Business Relationships</td>
<td>8</td>
</tr>
<tr>
<td>3.1</td>
<td>Adding new Business Relationships</td>
<td>8</td>
</tr>
<tr>
<td>3.2</td>
<td>Managing Business Relationships</td>
<td>10</td>
</tr>
<tr>
<td>3.3</td>
<td>Withdrawing from a Business Relationship</td>
<td>12</td>
</tr>
<tr>
<td>3.4</td>
<td>Business Relationships with Certification Body and SBP</td>
<td>12</td>
</tr>
<tr>
<td>3.5</td>
<td>Exporting Business Relationship details</td>
<td>13</td>
</tr>
<tr>
<td>4</td>
<td>Transactions</td>
<td>15</td>
</tr>
<tr>
<td>4.1</td>
<td>Creating a new Transaction</td>
<td>15</td>
</tr>
<tr>
<td>4.2</td>
<td>Transaction objects</td>
<td>18</td>
</tr>
<tr>
<td>4.2.1</td>
<td>Transaction Batches</td>
<td>19</td>
</tr>
<tr>
<td>4.2.2</td>
<td>SREG forms</td>
<td>20</td>
</tr>
<tr>
<td>4.2.3</td>
<td>Transaction documents</td>
<td>22</td>
</tr>
<tr>
<td>4.2.4</td>
<td>Dynamic Batch Sustainability Data (DBSD)</td>
<td>23</td>
</tr>
<tr>
<td>4.3</td>
<td>Sharing transaction</td>
<td>26</td>
</tr>
<tr>
<td>4.4</td>
<td>Revoking transactions</td>
<td>30</td>
</tr>
<tr>
<td>4.5</td>
<td>Selling to non-certified customers</td>
<td>31</td>
</tr>
<tr>
<td>4.6</td>
<td>Accepting and Rejecting transactions</td>
<td>33</td>
</tr>
<tr>
<td>4.7</td>
<td>Direct trading of transaction/biomass</td>
<td>34</td>
</tr>
<tr>
<td>4.8</td>
<td>Trading biomass (combining/splitting transactions)</td>
<td>35</td>
</tr>
<tr>
<td>4.9</td>
<td>Setting biomass as consumed (End-users only)</td>
<td>36</td>
</tr>
<tr>
<td>4.10</td>
<td>Deletion of transactions</td>
<td>37</td>
</tr>
<tr>
<td>4.11</td>
<td>Correcting already shared transactions</td>
<td>37</td>
</tr>
<tr>
<td>5</td>
<td>SAR Management</td>
<td>39</td>
</tr>
<tr>
<td>5.1</td>
<td>Creation of the SAR</td>
<td>39</td>
</tr>
<tr>
<td>5.1.1</td>
<td>Generalities</td>
<td>42</td>
</tr>
<tr>
<td>5.1.2</td>
<td>Feedstock data</td>
<td>43</td>
</tr>
<tr>
<td>5.1.3</td>
<td>Biomass production</td>
<td>44</td>
</tr>
<tr>
<td>5.1.4</td>
<td>Transport of biomass</td>
<td>44</td>
</tr>
<tr>
<td>5.1.5</td>
<td>Dynamic Batch Sustainability Data</td>
<td>45</td>
</tr>
<tr>
<td>5.1.6</td>
<td>Key dates and representatives</td>
<td>46</td>
</tr>
<tr>
<td>Section</td>
<td></td>
<td></td>
</tr>
<tr>
<td>---------</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5.1.7</td>
<td>Appendix 1 – Photographs/Illustrations</td>
<td></td>
</tr>
<tr>
<td>5.1.8</td>
<td>Appendix 2 - Production Process</td>
<td></td>
</tr>
<tr>
<td>5.2</td>
<td>Sending the SAR to the Certification Body for review</td>
<td></td>
</tr>
<tr>
<td>5.3</td>
<td>Certification Body SAR review</td>
<td></td>
</tr>
<tr>
<td>5.4</td>
<td>SBP validation and activation of the SAR</td>
<td></td>
</tr>
<tr>
<td>5.5</td>
<td>Updating the SAR</td>
<td></td>
</tr>
<tr>
<td>5.6</td>
<td>SAR history log</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>SBP Document Library</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Noticeboard</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>History log</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Data exporting and Reporting</td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Using DTS test environment</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Getting help and submitting feedback</td>
<td></td>
</tr>
<tr>
<td><strong>Annex 1</strong></td>
<td>Examples of DBSD data</td>
<td></td>
</tr>
</tbody>
</table>
1 Background

The SBP Data Transfer System (DTS) is an important tool which is necessary to support the integrity of the SBP certification system. It does that through facilitating the collection, collation and transmission of the data required by those generators (end-users) using biomass to produce energy. Importantly, the DTS allows SBP claims (e.g. SBP-compliant, SBP-controlled) to be transmitted along the supply chain.

Use of the DTS has been mandatory for all SBP Certificate Holders from 1 October 2016.

This user guide is for DTS 2.0 and should be used as guidance for all SBP Certificate Holders and any other stakeholders.

There are two systems in total: Test and Live. The URLs are as follows:

<table>
<thead>
<tr>
<th>Live</th>
<th><a href="https://v2.radix-tree.org/">https://v2.radix-tree.org/</a></th>
</tr>
</thead>
<tbody>
<tr>
<td>Test environment</td>
<td>Click here</td>
</tr>
</tbody>
</table>
2 Getting Started with the DTS 2.0

2.1 Accessing DTS 2.0

DTS 2.0 can be accessed at https://v2.radix-tree.org/. All SBP Certificate Holders receive an invitation to the platform after the issuance of their certificate by their Certification Body. Access to the system is granted directly by SBP.

All existing DTS 1.0 users are automatically upgraded to DTS 2.0. After the upgrade is complete, existing users will receive an email notification inviting them to log in to the updated system. All users will need to set a new password for their account when they log in to the DTS 2.0 for the first time.

After the DTS account has been registered by SBP, the user will receive the following email from ‘support’:

Dear Jane Smith

Thank you for registering with RADIX Tree. To activate your account for RADIX Tree click the link below:

Click here to activate your account

If the link above is not displayed or does not work, copy and paste the link below to the address bar of your browser:

https://agphkc0kn.accounts.ondemand.com/ids/activation?token=I18D2E802AB8A1999AA7B7C4C4CF9A2EDE1C8F6E8273406C958786C68F461CE3798F185AEE93328BD68D3C1EDC8A6471

Bookmark the following link to remember your login details:

https://gt1demo-xt38f98260_dispatchera.onedemand.com#/home/login

Best Regards,
The RADIX Tree Team

Please click on the green button to activate your account and set your password for DTS 2.0.
After setting up your password, you are redirected to the login page.

**Note:** DTS 2.0 login works only with e-mail address (not usernames). One email can be used to log in to the system and manage multiple SBP-certificates. Example: one person is managing five SBP-certificates and the email address of this person is set for all the users of these Certificate Holders. In this scenario, the system asks the person to choose a company to represent after the login:

Please contact DTS@sbp-cert.org if you need any assistance to set up the user(s) to manage multiple certificates or if you have not received an email invitation.

Access to DTS 1.0 will be restricted once users have been upgraded to DTS 2.0.
2.2 Home page layout and menu items

The Home page layout has gone through a significant upgrade and only includes SBP-relevant menus and data.
The main menu is located on the left side and can be expanded or collapsed by clicking on the button with three green stripes.

Key information/data is displayed in tiles in the centre of the page, each giving a basic summary. This includes Business Relationships, Transactions, Documents and Noticeboard.

The tiles include shortcut buttons to add new Business Relationships or Transactions. In addition, they display the current count of Business Relationships and Transactions, including any invitations or Transactions requiring users’ actions.

2.3 Managing and adding internal users

After your company’s primary contact person has received login information for the first time and successfully logged into the DTS portal, it is possible to add more internal DTS users. This could be used in cases where more than one person within a company needs to have access to the DTS.
Note that when one email address is added as an user for multiple companies, then the user can get access to all accounts with one login.

To see an overview of all DTS internal users go to left hand side menu and click on “User Details”:

To add a new user, click on the “+Add New” button and enter the details as prompted. After submitting the form, an email is sent to the email address inviting the person to activate their account.

The Role of the user defines the permissions that the user has in the DTS. The system allows you to create different users within the same company with different permissions. The first user registered by the company is automatically nominated as the Domain Administrator. If you need help managing your company’s day to day activities, so you can set up other users. Each user can be defined as either a Domain Administrator or a Standard User. Domain Administrators should be limited to persons with authority.

Standard Users are able to do the day-to-day tasks, but have following restrictions:

- They cannot create new Business Relationships
- They cannot add new users
- They cannot disable other users
After the user account has been set up, only the Domain Administrator can change the role of the user. Other user details can be changed by the user him/herself. Users can update and edit their own user profile through the profile menu:

Deactivating an internal user can be done from the same ‘User Details’ menu. To deactivate a user, simply ‘Disable’ the user from the list view. The system asks for your confirmation before deactivation. Users cannot be deleted, only deactivated. This is because the system logs the history of the actions of every individual user. If it becomes necessary to activate the user again, the Domain Administrator can simply reactivate or enable the account.
3 Business Relationships

In order to receive claims or make claims you must establish a Business Relationship with your suppliers and customers within the DTS. Business Relationships form a supply chain.

Three different types of business relationships are available:

- Supplier relationship
- Client relationship
- Supervisory relationship (SBP, CB)

By default, all certified companies and approved CBs will have a Business Relationship with SBP. Business Relationship between the Certificate Holder and its Certification Body must be established by the Certification Body.

It is up to you as the user to add new Business Relationships with suppliers and customers. New Business Relationships can be added by any user at any time. All companies you establish a Business Relationship with will be able to see details about your company, including documents uploaded to your company record. Supervisory accounts can also see those details as well as transaction data.

3.1 Adding new Business Relationships

To add a new Business Relationship, click on the “+Add New” button and search for your business partner from the ‘Search Companies’ field. Search by SBP certificate code is the preferred method to connect with your business partner. This ensures that you are sending the invitation to the correct SBP Certificate Holder. After typing in the company name or SBP certificate code, the system will populate all the other company-specific fields; these should not be changed. You can add your personal invitation text, which will be sent, via email, to your business partner together with the invitation.

As a last step, you should define the Relationship type and hit ‘Send Invite’.

Note: In case your business partner is both your customer and your supplier, please select “Supplier”. This does not limit functionality in the system, but can be used when filtering data at a later stage.
After sending the invitation to connect, the system sends an automatic email to your business partner with your request. In addition to the notification email, a notification will be sent within the system and will be shown on the DTS home screen under Business Relationships:

![Business Relationships](image)

Clicking on the message opens the Business Relationship invitation detail menu. This shows all sent and received invitations.

![Invitation Details](image)

**Note:** The general assumption is that Business Relationships are established with all your direct suppliers and customers. This allows visibility of company data and Standard 5 documents between you and your supplier/customer. In cases where the supply chain includes more links than a producer and the end-user of the biomass, the end-user (or any other party who has purchased your biomass, but does not have direct business relationship with you) may need to establish a separate Business Relationship in the DTS in order to access the Biomass Producer's data. The alternative is to send these documents outside the DTS.
3.2 Managing Business Relationships

Clicking on the Business Relationships menu opens the overview of all relationships.

To view Business Relationship details, including SBP-certification data, click on the company name or on the green information button on the right-hand side of the screen. Company details are divided into two separate subsections: ‘Business Information’ and ‘SBP Certification’.
The Business Information section includes contact details of the company. The SBP Certification section includes details about the SBP certificate.

The SAR data section is only applicable for Biomass Producers with approved SARs. All Biomass Producers have the list of the active SDIs attached to their company profile. The SDIs can be viewed by clicking on the 'Manage List' button. The SDI list is managed and updated by SBP upon approval of each SAR. The list is read-only between standard Business Relationships.
The number of Business Relationships is unlimited, and all the costs related to using the DTS platform are covered by SBP. Certificate Holders should not be making any direct payments in relation to using the system. Should you have any issues or questions, please contact DTS@sbp-cert.org.

3.3 Withdrawing from a Business Relationship

At any time, it is possible to Withdraw from a Business Relationship with a supplier or a customer. This means it is no longer possible to receive or send transactions to this business partner, and you will no longer see their company-specific data and they will not be able to see yours.

Note: It is not possible to withdraw a Business Relationship with SBP or your CB.

To Withdraw from the existing Business Relationship, click on the “Delete” icon on the right-hand side of the screen.

3.4 Business Relationships with Certification Body and SBP

By default, all certified companies and approved CBs will have a Business Relationship with SBP. Business Relationship between the Certificate Holder and its Certification Body must be established by the Certification Body. Business Relationships with the CB and SBP are ‘supervisory’ – this means it is
possible to enable account switching for these relationships. Account switching enables the supervisory relationship to log into your account. In case of Certification Bodies, this shall be enabled for the purposes of verifying correct DTS usage during SBP surveillance audits. For SBP, the functionality can be enabled for helpdesk if required.

To allow account switching, navigate to ‘Business Relationships’ overview page and admit the relevant Business Relationship like shown below:

![Business Relationship Overview](image)

This functionality is only enabled for ‘supervisory’ Business Relationships and cannot be turned on for supplier or customer companies.

You can see the full activities history log (login timestamp, generating reports timestamp, etc), when the supervisory account is using this functionality to log into your account, under ‘View activity’ menu.

### 3.5 Exporting Business Relationship details

The system provides an option to mass export Business Relationship data. This enables mass querying of information, such as SBP certificate codes, expiry dates, certificate status, active SDI codes and certification scopes of your Business Relationships.

To get started, navigate to your Business Relationship tile. Next, either select the Business Relationships you want to export or click “Select All”.

Then navigate to tools menu and click “Export”.

![Export Business Relationships](image)
The system then asks you, if you want to also download all attachments (e.g. SAR documents as pdfs). Clicking “Export” will initiate the download process of the Excel file. The export file includes two worksheets: “Business Relationship” and “SBP Certification”.

![Excel file export interface]

- **Contact Name**: Lauri Karmas
- **BR Type**: Supplier
- **Created Date**: Dec 19, 2019 8:50:33 AM
- **Admit**: Available
- **Actions**: Download with attachment

![Download confirmation]

- **Export**
- **Cancel**
4 Transactions

Transactions are the core content of the DTS and they represent received or sold tonnages of biomass with an SBP claim.

![Transaction Workflow Diagram]

Figure 1. Transaction workflow

4.1 Creating a new Transaction

To create a new Transaction, click on ‘Add new transaction!’ button on the Transactions tile.
Next, a form with Transaction details comes up.

**Transaction Name** is a required free-text field and is used to differentiate transactions. It is up to the company to decide how to name the transaction.

**Transaction Description** is an optional field to give additional description to the transaction, if desired.

**SBP certificate code (seller)** is a read-only field, which includes the seller’s certificate code.

**SBP-certificate code (buyer)** is a read-only field, which includes the buyer’s certificate code. This field will be auto-populated once the transaction has been shared.

**Invoice Date** is a required field that shall match with the invoice date on the physical sales invoice. In cases where the invoice is not yet generated, a date from a delivery document may be used.

**Invoice Number** is a required field that shall match with the invoice number on the physical sales invoice. In cases where the invoice is not yet generated, a matching number with a delivery document may be used.

**Invoiced Tonnage** is a required field that shall match with the total invoiced amount. This may differ from the total transaction tonnage in case the sales invoice also includes non-certified biomass.

**Transaction reference** is an optional field for companies to include a transaction reference other than the invoice number.

After filling these fields, the user can save the transaction. After saving, the transaction is listed under "Actionable" transactions. Note that a transaction shall have at least one transaction batch before it can be shared (see next paragraph – adding ‘objects’ to transaction).
To edit a transaction that is under the "Actionable" transactions list, click on the icon.
4.2 Transaction objects

A Transaction shall have at least one object attached to it before it can be shared. There are multiple types of objects that can be attached:

- Transaction Batch – required for all transactions
- SREG (inland transport)
- SREG (sea transport)
- Transaction document
- Dynamic Batch Sustainability Data (DBSD)

To add objects to the transaction, click on the “Manage objects” button on the transaction edit mode.

This will open a Transaction objects overview page, where the user can see objects already attached or add a new object.

Hover the mouse over “+ Create Object” button and select the object you want to create and add to the transaction.
4.2.1 Transaction Batches

Choosing “Transaction batch” from the objects lists will open a new window with transaction batch data.

![Transaction Batch Form](image)

**Note:** The Transaction Batch form is predefined and includes all required fields. The user does not need to use “+ Add Attribute” button to add other data to the batch form.

**Transaction Batch Name** is a required field to differentiate batches in a transaction. It is a free-text area and it is up to the user to name the transaction batch.

**Transaction Batch Description** is an optional field to add a description to the batch (for example, factory name etc).

**SDI list** is a dropdown field that includes all active approved SDIs from the SBP SAR document. This includes SDI code and description. **Note:** This is only applicable for Biomass Producers. For trading activities, a value “Other” should be used to manually enter the SDI code.

**AA-code** is a dropdown field with values ‘00’ and ‘99’. If the transaction includes DBSD data object, then ‘99’ should be used, in all other cases ‘00’ should be used.

**Product type** is either Chips or Pellets.
Production Batch ID (PB ID) is a read-only field, that is a combination of the SDI code and AA-code. The PB ID is always in the form: “SBP-XX-YY-ZZ(Z)-AA”, where SBP-XX-YY-ZZ(Z) is the Static Data Identifier (SDI) and AA is the Dynamic Batch Sustainability Data Identifier.

Tonnage (t) is the tonnage of the transaction batch in metric tonnes.

SBP claim type is either SBP-Controlled or SBP-Compliant. Only one transaction batch at a time can be either SBP-compliant or SBP-controlled. If both SBP-controlled and SBP-compliant biomass from the same Production Batch ID is sold in one transaction, separate transaction batches shall be created.

Batch type is a read-only field that shows if the added transaction batch is produced or traded by the company sharing the transaction.

Finally, click Submit. You can add as many Transaction Batches as needed to a single Transaction. It is also possible to delete a transaction batch or edit it after it has been created. But, this is only permitted if the transaction has not been shared with your customer. Once the transaction is shared, it is not possible to edit data in a transaction.

4.2.2 SREG forms

DTS 2.0 has integrated SREG forms that replace the following SBP template documents:

1. SBP Audit Report (SREG) on Energy and Carbon Data for Supplied Biomass for Inland and Sea Transport;
2. SBP Audit Report (SREG) on Energy and Carbon Data for Supplied Biomass for Inland Transport

SREG forms are ‘objects’ in the DTS and can be attached to every single transaction. To add a SREG form to the transaction, click on the “Manage objects” button when in the transaction edit mode, hover the mouse over “+ Create Object” button and select the SREG object from the list. The DTS includes two SREG objects:

- SREG Inland Transport
- SREG Sea Transport

It is possible to create and attach multiple SREG objects to a single transaction.
The SREG Inland Transport form includes only inland transportation data:

The SREG Sea Transport form the sea transportation data in addition to the inland transportation data:
4.2.3 Transaction documents

It is possible to attach documents to the transaction. This is also managed under the objects menu.

To add documents to the transaction, click on the “Manage objects” button when in the transaction edit mode, hover the mouse over “+ Create Object” button and select the ‘SBP Transaction documents’ object from the list. Next, give the document a name and upload it from the computer. Finally click save and repeat the process if you want to add more documents.
4.2.4 Dynamic Batch Sustainability Data (DBSD)

Additional requirements apply to those SBP Certificate Holders wishing to supply certain markets, e.g. the Netherlands or Flanders. These additional requirements include transferring additional data through the DTS. In order to be able to use the additional functionality of transferring DBSD through the DTS, the Biomass Producer's SBP certificate scope shall include communication of Dynamic Batch Sustainability Data (DBSD).

Additional data shall be added to the transaction by using the DBSD ‘object’. To add a DBSD object to the transaction, make sure that the transaction already includes Transaction Batch Object – DBSD can only be added to the transaction after at least one transaction batch has been created. To add the DBSD object, hover over ‘+ Create Object’ button and select DBSD object from the list. NB: The object list may include previous versions of the DBSD template, the user shall always select the latest version of the template, which is marked as “Active”.

Next, fill in all required fields (help text for each field is displayed when you hover the mouse over the field name):

- **DBSD Name** is a free text field to name the data object. No predefined format. Examples: “DBSD 1”, “Dynamic Data 1”, etc.
- **Production Batch ID** is the PB ID that is related to the DBSD tonnage. Only one PB ID can be selected per DBSD object. The PB ID shall match with the PB ID which is previously entered to the transaction's
Batch. PB ID has to follow the format “SBP-XX-YY-ZZ(Z)-AA”. The AA-code shall always be ‘99’ when DBSD is used.

**Biomass Tonnage** is the tonnage of the biomass for the DBSD entry. This volume of the biomass is linked with all the parameters included in the DBSD.

**Biomass Category** is the Biomass Category as defined by SDE+, please choose the appropriate one.  

SDE+ defines the following Biomass Categories:

Category 1: Woody biomass from large Forest Management Units (FMUs ≥ 500ha). Branches, tops, trees and primary felling residues sourced directly from forests of 500ha or larger. Unused wood that has the same composition as wood growing in the forest and that has not been mixed with or contaminated by foreign materials or substances.

Category 2: Woody biomass from small Forest Management Units (FMUs < 500ha). Branches, tops, trees and primary felling residues sourced directly from forests of less than 500ha. Unused wood that has the same composition as wood growing in the forest and that has not been mixed with or contaminated by foreign materials or substances.

Category 3: Residues from nature and landscape management. Biomass residues (branches, tops, trees) produced in the course of managing urban and rural green spaces and nature areas, other than forests designated for the preservation, restoration or enhancement of specific natural, recreational or aesthetic functions. These also include biomass residues produced during routine maintenance of public green spaces and parks.

Category 4: Agricultural residues. Residues obtained directly from agricultural business. Short rotation crops are excluded, with the exception of the residues thereof.

Category 5: Biogenic residues and waste flows. Waste flows and residues from the agro-food and timber industry (secondary residual flows) and tertiary residual flows such as post-consumer wood waste.

**Feedstock Categories:** In the SBP system, feedstock with attributes that allow it to be processed into biomass meeting one of the defined Biomass Categories may be referred to as a corresponding Feedstock Category, for example biogenic residues and waste feedstock may be referred to as Feedstock Category 5. The biomass made from such feedstock is referred to as Biomass Category 5.

Note: Where the size of the FMU cannot be determined then Biomass Category 1 should be selected, not Biomass Category 2.

**Market Specific Status** is the compliance status of the biomass covered by the DBSD, please choose the appropriate one. The following options are available (multiple options can be chosen):

- NL SDE+ Compliant
- NL SDE+ Controlled
- Flanders Compliant
- Not Applicable

---

1 References:

- 'Conformiteitsbeoordeling vaste biomasa voor energietoepassingen' (in Dutch).
- 'Sustainability criteria for solid biomass for energy applications' https://english.rvo.nl/sites/default/files/2018/02/Guidance-Chain-of-Custody-EN.pdf (in English)
Status “NL SDE+ Compliant” and/or “NL SDE+ Controlled” may be only used for biomass that was produced following the Instruction Document ID2D (Category 1), ID2E (Category 2) or belonging to Category 5 biomass.

If the “Market Specific Status” field option is selected as “Flanders Compliant”, a sub-section “Flanders” is displayed.

This sub-section includes following fields:

**Flanders compliant biomass from processing residues** – picklist Yes/No/N/A

This claim on processing residues is linked to the corresponding Feedstock Group as described in ID5E.

It must be:

- Processing residues in Column B
- Sawmills and wood industry residues in Column C

**Note:** Instruction Document 5E, Section 5.3. The Flemish regulator, VEA, reports that for biomass supply to the Flanders market, ‘NL SDE+ Compliant for Biomass Category 5’ meets the definition of ‘Flanders Restricted biomass from processing residues’ including sawmill and wood industry residues in the form of sawdust, shavings and chips, and is deemed equivalent.

Users are permitted to select ‘Yes’ for “Flanders compliant biomass from processing residues” in cases “Category 5” is selected for NL SDE+ Biomass Category. This also applies for traders selling Category 5 biomass in stock, that was purchased prior to introduction of “Flanders compliant biomass from processing residues” in the DTS.

**Flanders compliant biomass from processing residues restricted to sawdust** – picklist Yes/No/N/A

This claim on processing residues is linked to the corresponding Feedstock Group as described in ID5E.

It must be:

- Processing residues in Column B
- Sawmills and wood industry residues in Column C
- Sawdust in Column D

**Flanders compliant biomass from processing residues restricted to sawdust and shavings**

– picklist Yes/No/N/A

This claim on processing residues is linked to the corresponding Feedstock Group as described in ID5E.

It must be:

- Processing residues in Column B
- Sawmills and wood industry residues in Column C
- Either sawdust and/or shavings in Column D

Note: Examples of the correct use of the Flanders section in the DBSD are shown in Annex 1 below.

**NTA 8003 level 3 code** is the NTA 8003 classifications as presented in the short list below and as defined at the following website: https://www.ecn.nl/phyllis2/Browse/Standard/NTA-8003 (in Dutch), please choose the appropriate one.

NTA 8003 feedstock classifications suitable for pellets are:
- 111 mix of fresh wood,
- 116 by-products industry, incl. sub-categories:
  - 112 bark,
  - 115 sawdust,
  - 119 other fresh wood/residues

**Country of origin of the feedstock** please enter all countries of origin of the feedstock that were used to produce the volume of biomass that is included in the DBSD. In cases where the feedstock is sourced from multiple countries, the share (%) of each country shall be included. Example: “Denmark – 10%, Germany 90%”. The share % shall always total 100% for one DBSD entry.

**Feedstock certification system** please select the feedstock certification system. Please see all SDE+ approved schemes [here](#). For Category 5 – N/A.

- ATFS
- Better Biomass
- FSC International (V5)
- FSC US
- GGL
- SFI
- ISCC
- Other (specify below)

**Feedstock certification system claim** (optional) please add a specific claim of the feedstock certification system, e.g. ‘FSC 100%’ or ‘FSC Controlled Wood’. For Category 5 - N/A.

**Feedstock is sourced by using SBP ID2D (Group Scheme)** indicate if the feedstock has been sourced from SBP Group Scheme members. For Category 5 - select N/A.

**Feedstock is sourced by using SBP ID2E (SDE+ Category 2)** please indicate if the feedstock is sourced according to SBP Instruction Document 2E: SBP Requirements for Risk Based Approach for Biomass Category 2. For Category 5 - select N/A.

**Other** (optional) is for any other notes.

### 4.3 Sharing transaction

Once you have added Transaction Batches and any other relevant objects to the transaction, you are ready to share the transaction with your customer and add invoice specific data. To share a transaction, you need to click on the “Share” button either when in the Transaction edit mode:
Or the “Share” button on the Actionable transactions list view:

After clicking the “Share” button, a new page will appear where you have to enter the company/customer with whom you want to share the transaction.

Start typing in the company name you want to share the transaction with, and the system will find the match for you from your Business Relationships.

**Note:** You cannot share a transaction with a company/customer who is not connected with you via a Business Relationship (except non-certified customers, see section “Selling to non-certified customers”).

**Note:** A single transaction might not be linked to a single invoice. An invoice can include several transactions.

Once the transaction is shared with your business partner it cannot be shared with another customer and it will be in read-only mode; no modification of the data is possible. The transaction will be moved from the “Actionable” view to the “Shared” view.
Clicking on the transaction or on the information button will show more details about the transaction sharing status. The upper section of the details page includes automatic fields that are updated as the transaction is created, shared and accepted or rejected.

1. The transaction details section after creating the transaction. The ‘Edit’ button is visible since the transaction has not been shared yet. Only the Name, Status and Created Date fields are visible.

2. The transaction details section after the transaction has been shared with another Business Relationship, but is still pending. The ‘Edit’ button has disappeared and the transaction is locked. The status has been updated to “Waiting for approval” and one new field – “Receiving Company” has been added.

3. The transaction details section after the transaction has been accepted by your business partner. The additional fields, Sharing Company, Sending Date and Accepted Date have appeared. The status has been updated.
**Sharing Company** shows which company has shared the transaction with you when it is an accepted transaction. If the transaction is shared by you it shows your company name. This is updated once the transaction has been shared.

**Receiving Company** shows the company that has accepted the transaction. This field updates itself after acceptance of the transaction.

**Status** is updated automatically after creation, sharing, acceptance or consumption of the transaction.

**Created Date** is a timestamp of the date when the transaction was first created.

**Sending Date** shows the date when the transaction was shared (not accepted) in the DTS.

**Accepted Date** shows the date when the transaction was accepted by the business partner in the DTS.

**Note:** The date fields above are not invoice-specific, but system fields that are updated as the status of the transaction changes.
4.4 Revoking transactions

The system allows transactions that you have shared with your business partner, but which have not yet been Accepted or Rejected to be revoked. This enables the user to revoke the transaction to make any necessary changes or fixes to the transaction and share it again. Once revoked, the transaction will disappear from the customer’s pending transactions list. The customer will get an email notification once the transaction has been revoked. To revoke a transaction that is currently locked and in “Waiting for receiver approval” status, open the “Shared” transactions view and click on the [Revoke] button.

The system asks you to confirm the action to avoid accidental clicks on this button.

Once confirmed, the transaction is moved from the “Shared” transactions to “Actionable” transactions and becomes editable again. The status is updated to “Revoked”. The user can make necessary changes and share the transaction again.
An email notification is sent to the business partner whose transaction was revoked:

4.5 Selling to non-certified customers

In some cases, SBP-certified biomass is sold to organisations that are not themselves SBP-certified. As DTS access is only granted to SBP-certified entities, it is not possible to create a Business Relationship with non-certified organisations and therefore not possible to share transactions as described in the section “4.2 Sharing Transactions”.

In order to sell SBP-certified biomass to non-certified organisations, create a new transaction as described in the section “4.1 Creating new transaction” and add transaction batches as described in the section “4.2 Transaction Objects”.

After the transaction has been created and relevant transaction objects added, save the transaction and return to the “Actionable” transactions list.
To set the transaction status to “Sold to NON-SBP”, check the transaction and click on “Change status” button as shown below:

Next, you will need to confirm the status change:

This will update the transaction status to “Sold to non-SBP” and locks it to prevent further editing. The transaction is also moved from “Actionable” to “Shared”.
4.6 Accepting and Rejecting transactions

An email notification is sent to the receiver of the transaction after the transaction has been shared with them. There will be an in-system notification to the customer about the new transactions.

After clicking on the notification, the “Actionable” transactions view will open, where the user can accept the transactions.

To view details about the incoming transaction, click on the transaction name or on the  button.

Acceptance of the transaction updates the status of the transaction to “Accepted” and updates other transaction details, such as Status and Accepted Date. After accepting the transaction, the transaction is moved from the “Actionable” transactions to “Accepted” transactions list.

Rejection of the transaction can be used in cases where during the preview of the transaction something is found to be incorrect and supplier needs to make changes. Rejection of the transaction sends the transaction back to the supplier and the transaction becomes unlocked for the supplier to make the necessary changes. After making the changes, the supplier can share the transaction with the customer again. When clicking the “Reject button, the user has to enter the “Rejection reason”, which the supplier can review to make relevant changes or fixes to the transaction.
The system allows mass-accepting of incoming pending transactions. To accept multiple transactions at a time, open the Actionable transactions view and select the transactions you want to accept and click on the “Accept all” button as shown below:

4.7 Direct trading of transaction/biomass

In order to make trading activities more user-friendly in the DTS, traders have an option to directly re-share the transaction that they have received from their supplier. Note that this solution can only be used when a transaction with the same attributes is to be traded to the next customer. This means that with direct trading, it is not possible to change the transaction batch information including SBP claim, product type, PB ID and tonnage. It is also not possible to add transaction batches or delete already attached batches.

It is possible, however, to update invoice-specific fields, transaction name and description and add other objects, such as SREG, DBSD form or transaction documents.

For direct trading, the incoming transaction from the supplier must be first accepted in the DTS. Then, go to the “Accepted” transactions section. Next, find the transaction you want to re-share and click on the button. This opens the Transaction detail section, where you have to enter a new Invoice Date, Invoice Number, Tonnage and Transaction reference. The transaction name is by default the same as it was on acceptance, but it is possible to edit this as well.

Click the “Manage Objects” button to review existing objects and to add any new ones.
After this step is complete, click button, which will open the page to select the business partner with whom to reshare the transaction.

Resharing the transaction clones the incoming transaction and the reshared transaction will get a new unique ID. The accepted transaction will remain under the “Accepted” transactions view and after clicking “Reshare”, the system clones the transaction with all the objects attached and the clone is copied to “Actionable” transactions. It is only possible to reshare an incoming transaction once.

The unique ID of the transaction is displayed beneath the transaction name:

Note: All objects added to the transaction by different links in the supply chain will be visible to the next owner of the transaction in the DTS. Example: A Biomass Producer adds an SREG document to the transaction, shares the transaction with a Trader A. Trader A can access the SREG document and add more documents to the transaction (they cannot delete or edit document from the Biomass Producer). After Trader A shares the transaction with the End-user A, End-user A can see the transaction documents from the Biomass Producer as well as from the Trader A.

4.8 Trading biomass (combining/splitting transactions)

In cases where biomass in not directly shared with the next legal owner, but is either unloaded in storage facilities and sold later, combined with biomass from other producers, or split between different customers, the following steps shall be undertaken in the DTS.

When it is desired to combine many small transactions from several producers and sell these as one, larger transaction in the DTS, the user shall first receive the biomass from the supplier in the DTS.

After the incoming biomass transactions have been accepted, a New Transaction shall be created.

Next, Transaction Batches shall be created manually by the user. The Transaction batch can then include up to the same volume of biomass that had been previously accepted by the user in the DTS with the same Production Batch ID and SBP claim. This means it is possible to combine the tonnage of biomass from more than one transaction, which carries the same Production Batch ID and SBP claim. At any time, the volume of sold biomass per Production Batch ID and SBP claim type shall not exceed volumes purchased with the same sustainability characteristics.

One Transaction can include several combined transaction batches (e.g. one Transaction Batch includes combined tonnage of biomass from several transactions with the same Production Batch ID and SBP
claim and the second Transaction Batch includes combined tonnage of biomass from several other transactions with the same Production Batch ID and SBP claim).

All transactions that are not directly shared with the customer but are received/accepted and a new transaction created afterwards shall be Archived. In addition, transactions that are received with an SBP claim, but sold without an SBP claim, shall be marked as "Archived".

To change the status of the accepted transaction to "Archived", open the "Accepted" transaction view and select the transaction that you wish to set to "Archived" status and click on the "Change Status" button, choose the "Archived" option from the list and hit OK.

Archiving the transaction will update the status of the transaction to "Archived" and locks it to prevent further editing. It is only possible to mark transactions that have not been reshared directly, consumed or sold to non-SBP customers as Archived.

**4.9 Setting biomass as consumed (End-users only)**

End-users of biomass are required to mark all transactions "Consumed" in the system, after the biomass has been physically accepted from the supplier and consumed in the energy production process. This will lock the transaction and update its status, as well as initiate the tonnage calculation in the background.

Biomass End-users should mark all transactions that have been physically consumed to "Consumed" status a minimum of twice (2 x) per year and always before an upcoming SBP surveillance audit.

To mark an accepted transaction as consumed in the system, select the transactions from the "Accepted" transactions list and click on the "Change Status" button, choose "Consumed" option from the list and hit OK.

After setting the transaction to "Consumed" status it becomes locked and it is no longer possible to reshare or change the status of this transaction.
4.10 Deletion of transactions

A user can only delete transactions that are created by themselves and have not yet been shared with a customer.

This means that only transactions under “Actionable” that have been created by the user itself, can be deleted. To delete a transaction and all related objects, click on the 

button next to the transaction:

To delete multiple transactions together, select the transactions and click on the 

button on the top menu:

4.11 Correcting already shared transactions

It is not possible to change or delete already shared and accepted DTS transactions. However, should errors be discovered it is necessary for corrections to be made. Corrections should be made as follows:

1) **Tonnage of the original transaction is incorrect.** To amend the tonnage of the original transaction, a new DTS transaction must be created. The new transaction shall include the same details, including transaction batch data and invoice references, as the original transaction except the batch tonnage shall be the difference in tonnage between the incorrect tonnage entered and the correct tonnage. If the actual tonnage is smaller than that entered, then enter a negative batch tonnage. In addition, a transaction description should be added to state that the new transaction amends the original transaction with a specific reference code. The transaction must be shared with and accepted by the customer.

2) **Full DTS transaction needs to be credited/removed.** As it is not possible to remove a transaction, it needs to be credited so that the total tonnage for the transaction with a specific reference is balanced out to zero. To credit a full transaction, the same steps as described under 1) must be followed, with the full tonnage entered as a negative amount.

3) **Other details about the biomass needs to be changed.** In cases where the core data of the original transaction need to be changed (e.g. SBP claim, PB ID, etc), then option 2) must be applied first to fully credit the incorrect transaction. Once fully credited, a new and correct transaction must be created and shared with and accepted by the customer. It is also an option to credit the incorrect transactions batches and add correct data within one new transaction at the same time.
The approach of using credit transactions allows Certification Bodies to verify all changes to the transactions.
5 SAR Management

All Biomass Producers can complete the SBP Audit Report (SAR) on Energy and Carbon Data directly in the DTS. This replaces the existing Word/PDF templates. The following three templates are available for users:

- SBP Audit Report (SAR) on Energy and Carbon Data for Pellets
- SBP Audit Report (SAR) on Energy and Carbon Data for Woodchips with Mobile Chipping
- SBP Audit Report (SAR) on Energy and Carbon Data for Woodchips with Stationary Chipping

All active versions of the SARs are available for use. In the case of the new version of the SAR template, the system automatically allows creation of the valid SAR template or copying the content from the old SAR template to the new template.

5.1 Creation of the SAR

To create a new SAR, log in to the DTS and navigate to the “SAR Management” menu:
This opens the SAR Management page, where you can see all your SAR templates that have been created in the DTS platform. Note that SARs completed outside of the DTS are not listed in this overview.

The default view displays all SARs with the status, expiry date, created date and SAR template details.

On top, you can narrow down the list of the SAR templates that are displayed on the page (SAR for pellets, woodchips with mobile and stationary chipping).

To create a new SAR, first select the relevant template from the dropdown menu and click the "Add" button.

You will be prompted to review the name of the new SAR template (by default this is ‘company name’ and ‘created date’) and confirm the creation of the new SAR.

**Note:** You can only have one SAR template with the same status and type, e.g. you cannot create two SAR templates for wood pellets that are in the “Draft” status.

Once this is done, a new SAR record is created and saved:
You can open and edit the SAR by clicking the edit report icon. You can download the SAR at any point to pdf format by clicking the download SAR button.

After clicking the edit report button, the SAR opens for editing. Some of the fields are automatically pre-populated based on the existing information in the DTS “SBP Certification” section (Certificate code, Certificate Holder name). The fields in gray are read only and either only editable for Certification Body users or automatically calculated based on other field values (example below: the SAR expiry date is calculated automatically after the auditor has entered the last audit date to the report).

It is important to click the “SAVE” button on each page before navigating to the next page. If the save button is not clicked, the changes are not saved when navigating to the other pages.

When saved, you will see a green “Success” pop-up:

![Success](image)

To navigate to the other sections of the report, either select the relevant page from the “Document outline” section on the left hand side or click on the “NEXT” button to take you to the next page.
5.1.1 Generalities

This section provides an overview, including contact details, of the Biomass Producer and the Certification Body.

### 1 Generalities

#### 1.1 General information on the Biomass Producer

<table>
<thead>
<tr>
<th>Company name</th>
<th>Biomass Producer 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact person on site</td>
<td>Jonas Smith</td>
</tr>
<tr>
<td>Contact person’s function</td>
<td>Certification Manager</td>
</tr>
<tr>
<td>E-mail address</td>
<td><a href="mailto:Jonas@email.com">Jonas@email.com</a></td>
</tr>
<tr>
<td>Address</td>
<td>Woodwarming 322-4, Rotterdam, NL-34322, Netherlands</td>
</tr>
<tr>
<td>Telephone</td>
<td>+31 202 240 4</td>
</tr>
<tr>
<td>DBSD enabled?</td>
<td>Yes/No</td>
</tr>
</tbody>
</table>

#### 1.2 Justifications for data provided and methodologies used

The text made be used to provide additional information appropriate to the whole SAR, for example selection of a reference period other than 1.2 months or how recording of data has been undertaken for a recently commissioned plant.

The reporting period is 12 months and covers the full calendar year. More explanation to be added here.

#### 1.3 Basic information on the Certification Body (CB)

<table>
<thead>
<tr>
<th>Name of the Certification Body</th>
<th>Central Union Certifications BV</th>
</tr>
</thead>
<tbody>
<tr>
<td>Audit team members</td>
<td>Auditor Name</td>
</tr>
<tr>
<td>Qualifications of team members</td>
<td>Lead Auditor</td>
</tr>
<tr>
<td>Contact details of the auditor (email)</td>
<td><a href="mailto:Auditor@email.com">Auditor@email.com</a></td>
</tr>
</tbody>
</table>
5.1.2 Feedstock data

This section requires the user to enter an overview of the feedstocks used during the reporting period.

This field is automatically calculated from the raw mass entered below.

Click the “+” icon to add more columns. Click on the recycle bin icon to remove a column.

Gray sections may only be edited by the auditors, but comments entered here by the CBs are visible also to the BPs.
5.1.3 Biomass production

This section requires the user to enter production specific values. Photos and full description of the production process can be entered in Appendix 1. Below is an example of the fields and field sets used in this section.

When a section is not applicable, tick mark the checkbox and it will become read-only/grayed out.

Use the “+” icon to add more columns and the recycle bin icon to delete a column.

5.1.4 Transport of biomass

This section requires the user to enter information about the transport and storage of the biomass.

Enter the SDI code in the format “SBP-XX-YY-ZZ”. Incorrectly entered SDI codes are not saved. The description of the SDI is limited to 40 characters. Both the SDI and the SDI description will be shown in the Transaction Batch SDI list after the SAR has been validated.

Always click “SAVE SDI” when the table has been completed.
5.1.5 Dynamic Batch Sustainability Data

This section requires the user to enter sold biomass volumes with DBSD during the reporting period.
5.1.6 **Key dates and representatives**

This section requires the SAR to be signed off by the company representative, Certification Body auditor and technical reviewer, as well as the SBP officer.

5.1.7 **Appendix 1 – Photographs/Illustrations**

This section shall include photographs/illustrations/pictures of, at least, the following:

- Feedstock storage
- Overview of biomass manufacturing plant
- Dryer(s) (if any)
- Wood chippers (green island, dry island)
- Press(es) if wood pellets
- Biomass storage and handling

A ground plan of the facilities and / or a flowchart shall also be included if available.

Please add the dates when the photographs were taken.
In this section, please describe the on-site biomass production process, focusing on any variation from best practices, and include a detailed description of the processes undergone by feedstock.

**Appendix 2 - Production Process**

This is a free text box, where it is possible to also add images and formatted text. You can add an image by selecting the image file from your PC or by pasting the image directly to the textbox (Ctrl+V).

Please link this to the Feedstock Column number from table 2.1.
5.2 Sending the SAR to the Certification Body for review

When the SAR has been completed by the company, it should be sent to the Certification Body for review. This can be done directly in the system by clicking the "SEND TO CB" button:

Before submitting the SAR to the CB for review, please make sure that you have saved all changes on all pages, including saving the SDI list in the section ‘Transport of biomass’.

The system does not prevent making changes to the SAR after the SAR has been submitted to the CB for review to allow more flexibility. However all changes are logged in the history log and it is possible to see who has done what changes and when.

Note that an automated email is sent to the CB auditor after the SAR has been sent to the CB for review. The CB contact person who receives the email is defined by the email address entered to section 1.3.
An email notification, similar to the following, will be sent:

![Email notification example]

You can track the status of the SAR at any time by logging in to the DTS and navigating to the SAR management menu:

![SAR management menu example]

### 5.3 Certification Body SAR review

Once the company has submitted its SAR to the CB for review, an email notification is sent to the auditor (see details in section 5.2). It is possible to access the SAR by clicking the link in the email notification or by logging in to the DTS and clicking on the SAR management menu (NOTE: do not navigate to the company profile, as this will switch your role to company user and you cannot fill in CB review fields in the SAR).
You can download the pdf report by clicking on the icon. To open and edit the report, click on the icon.

Please fill in all sections relevant for the CB – these sections are marked with “(CB)”.

Currently, it is not possible to send separate comments back to the company, when something needs changing. When this is required, a separate email message outside of the DTS shall be sent to the company.

When all CB fields are filled in and the whole document has been reviewed and approved, the SAR needs to be signed off by the auditor and the CB technical reviewer in section 6.2.

To approve the SAR, click “APPROVE BY CB” button. This notifies SBP to validate and activate the SAR (an automated email is sent to info@sbp-cert.org – there is no need to notify SBP about a new SAR validation separately).

Approving the SAR also updates the SAR to ‘Approved by CB’ status.
5.4 SBP validation and activation of the SAR

Once the SAR has been reviewed and approved by the CB, SBP makes the final validation and activates the SAR. After validating the SAR it becomes active in the DTS immediately, replacing the SDI values in the ‘SBP Certification’ section under the company profile as well as updating the pdf SAR documents that are accessible for all Business Relationships.

When the SAR is validated by SBP, an automated email is sent to the company representative as well as to the CB auditor.

5.5 Updating the SAR

When there is an active version of the SAR already in the DTS that needs to be updated due to an annual audit or any other reason, the user can choose to clone the existing SAR to avoid manually filling out the whole SAR from scratch.

To create a new copy of the already approved SAR, navigate to the SAR management menu and click on the “Clone Report” button.

Note that this function is only available, if you have at least one SAR validated and no other draft versions of the same SAR template created.

This will clone the validated SAR and create a new draft version of the SAR ready to be edited.
5.6 SAR history log

The system saves a new version of the SAR each time the form is saved. This allows users to view the changes done, including the date of the change and the user making the changes.

The history log can be accessed by clicking the “SAR History” button.

This displays all changes to the SAR template – each new save of a specific SAR page creates a copy of the previous version of the page.
6 SBP Document Library

On the home screen and on the left side menu is a tile called “Document Library”. This menu is read-only for the user and is maintained by SBP. This allows the user to quickly access the most recent version of the DTS user guide.

To access the Documents Library, click on the tile in the centre of the screen or click on the relevant menu on the left side menu. This opens an overview of all the documents uploaded:

To open or download a specific document, click on the document name and then on the document link:
7 Noticeboard

In the centre of the home-screen, there is a tile called “Noticeboard”. This tile gives the user an overview of the changes in SBP certification among the Business Relationships. Example: ‘Biomass Producer 1’ SBP certificate is suspended – all companies connected to ‘Biomass Producer 1’ in the DTS will get a notification on their home screen’s Noticeboard about this change. Updates in the Noticeboard are displayed for five days.
8 History log

DTS 2.0 includes a history logging functionality. This is available for the full user activity and includes also login history.

The history log can be accessed from the profile menu “View activity” section.

The history log displays the most recent activities with the activity description and the timestamp. The default time zone in the history log for all users is Greenwich Mean Time (GMT).

The log also includes records of supervising Business Relationships (e.g. SBP, CB or Technical Support) accessing the account.
9 Data exporting and Reporting

It is possible for all users to export the transaction data in the DTS to an Excel (.xls) format at any time. There are two options to export data in the DTS 2.0:

- Option 1 - export of selected transactions under the **Transactions menu**
- Option 2 - mass export under the **Reports menu**

**Option 1** is available directly under the Transaction menu. This option allows users to export the transaction data that are manually selected. The Export function downloads all transaction and object data, additionally it is possible to export all attachments that are associated with these transactions.

To get started, navigate to the **Transactions** menu and select the transactions you want to export. You can manually select these or use the “Select all” or “Select all on this page” function.

After selecting the transaction, click on the export button.

The system will then ask if you want to download the attachments as well.

![Export button](image)

Clicking the ‘Export’ button will start the download. Transaction data will be downloaded as an .xlsx file type and the downloads will be included in a .zip file.

The exported Excel file will have multiple worksheets – depending on the different objects attached to the transactions. For example:

- Transaction Master
- Transaction
- Transaction Batch
- SBP Transaction documents
- DBSD
- SREG Inland transportation
- SREG Inland and Sea transportation
Option 2 is data mass export using the Report menu.

The page has three available fields that the user needs to define before exporting the data.

**Created from** enter the earliest creation date of the transactions that you want to be included in the report.

**Created to** enter the latest creation date of the transactions that you want to be included in the report.

**Type** select the type of the report (see report types below).

---

**Available report types** currently one report type covering all transaction and related object data is available – “Transactions by movements”. This report includes all incoming and outgoing transactions in separate Excel worksheets. In addition, all related objects (Transaction Batch, SREG forms, DBSD, documents, etc) are included in the report.
10 Using DTS test environment

All SBP Certificate Holders can use the demo environment of the DTS for any testing activities. All actions taken in the demo system are for test purposes only, including Transaction sharing, Business Relationship creation and withdrawal and any other action. The demo system may include outdated data, be occasionally offline or include features not included in the live environment.

The demo system is marked with purple “DEMO” watermark on top of SBP logo:

Please contact DTS@sbp-cert.org with a request to get DTS demo account activated.

The demo system can be accessed here.
11 Getting help and submitting feedback

Please submit all questions, enquiries, feedback and ideas for improvement regarding the DTS 2.0 to DTS@sbp-cert.org or submit the issue directly through DTS built-in support desk.
Annex 1 – Examples of DBSD data

Example 1:

The Biomass Producer uses woodchips (secondary), sawdust and shavings as feedstock for certified pellets.

The Biomass Producer wishes to supply pellets to the Flemish market with a corresponding DBSD market status. The ID 5E requirements towards SAR Feedstock Groups are met.

**DBSD Flanders**

<table>
<thead>
<tr>
<th>Feedstock Description</th>
<th>Requirement Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Flanders Restricted biomass from processing residues</td>
<td>YES</td>
</tr>
<tr>
<td>Flanders Restricted biomass from processing residues restricted to sawdust</td>
<td>NO</td>
</tr>
<tr>
<td>Flanders Restricted biomass from processing residues restricted to sawdust and shavings</td>
<td>NO</td>
</tr>
</tbody>
</table>

Example 2:

The Biomass Producer uses sawdust and shavings as feedstock for certified pellets.

The Biomass Producer wishes to supply pellets to the Flemish market with a corresponding DBSD market status. The ID 5E requirements towards SAR Feedstock Groups are met.

**DBSD Flanders**

<table>
<thead>
<tr>
<th>Feedstock Description</th>
<th>Requirement Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Flanders Restricted biomass from processing residues</td>
<td>YES</td>
</tr>
<tr>
<td>Flanders Restricted biomass from processing residues restricted to sawdust</td>
<td>NO</td>
</tr>
<tr>
<td>Flanders Restricted biomass from processing residues restricted to sawdust and shavings</td>
<td>YES</td>
</tr>
</tbody>
</table>
Example 3:

*The Biomass Producer only uses sawdust.*

*The Biomass Producer wishes to supply wood pellets to the Flemish market with a corresponding DBSD market status. The ID 5E requirements towards SAR Feedstock Groups are met.*

**DBSD Flanders**

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