

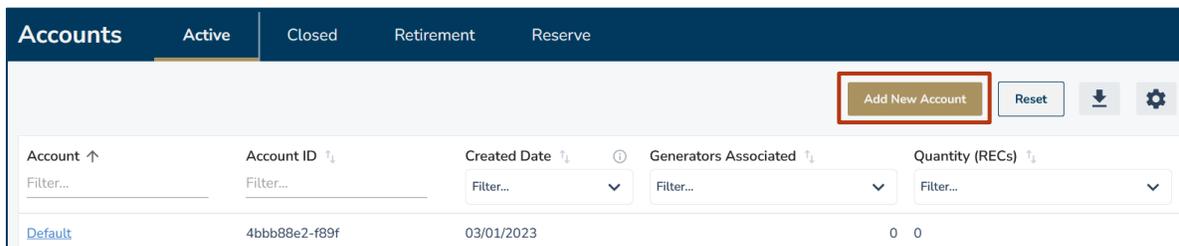
WREGIS certificates are stored and organized in accounts. There are three account types: active, retirement, and reserve. The account type indicates a certificate’s status. You may transfer certificates between active accounts as needed. You cannot transfer certificates out of retirement or reserve accounts.

There is no limit to the number of accounts you can create within your WREGIS organization. Every WREGIS organization (generator and general) comes with one default account of each type (active, retirement, and reserve).

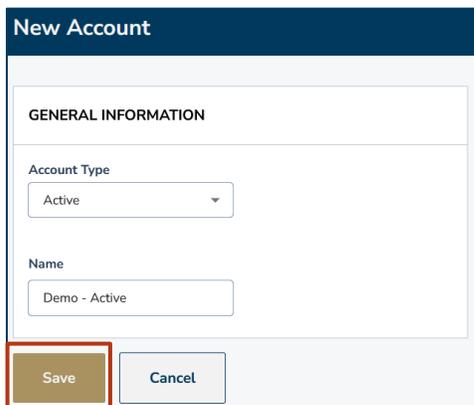
Creating an Account

To create a new account—

1. Navigate to **Accounts** and click **Add New Account** in the upper-right of the screen.



2. Select the account type, enter the account’s name, and click **Save**.



NOTE: Many voluntary and compliance programs have specific instructions for creating and naming retirement accounts in WREGIS. It is your responsibility to understand and follow program requirements when retiring certificates.

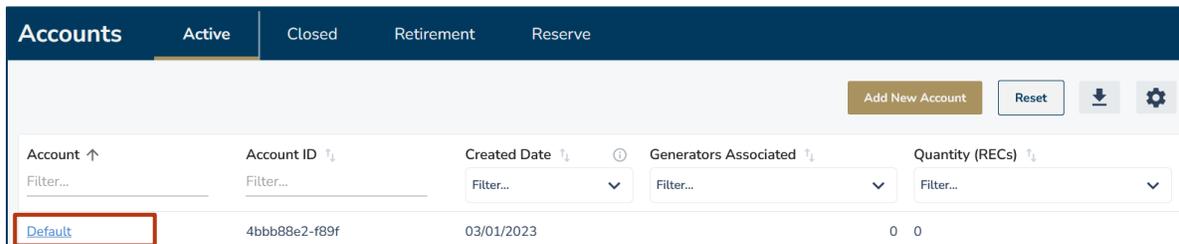
3. You can verify the new account by navigating to the accounts tab corresponding to the type of account you just created.

USER TIP: If you cannot see an account you just created, your user access may be limited through Advanced Account Permissions. Have someone with “Manage” Organization permissions check your user access before trying to add the accounts again, as this can result in duplicate accounts with the same name.

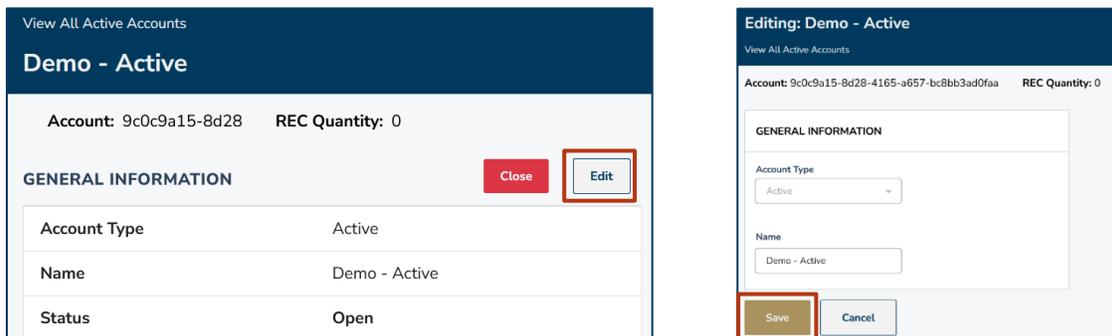
Updating an Account Name

You can change the name of an active account by editing the account’s information. You cannot change the name of a retirement or reserve account once you have deposited certificates in it and you cannot change an account’s type. To edit an account—

1. Navigate to **Accounts** and click the account name that you want to edit.



2. Click **Edit** to modify the account name. After making changes, click **Save**.



Closing an Active Account

If you no longer use an active account, you can close it to prevent future certificate deposits. An active account can only be closed if there are no certificates in it and no generators associated with it. To close an active account—

1. Navigate to **Accounts** and click the account name that you want to close. Click **Close**.



View All Active Accounts

Demo - Active

Account: 9c0c9a15-8d28 REC Quantity: 0

GENERAL INFORMATION Close Edit

Account Type	Active
Name	Demo - Active
Status	Open

2. A confirmation request will appear. Review the information and click **Ok**.

Are you sure you want to close this account?

Cancel OK

Archiving a Retirement or Reserve Account

If you no longer use a retirement or reserve account, you can archive it. You cannot add certificates to an archived account, though you can still view and report on certificates in it. To archive a retirement or reserve account –

1. Navigate to **Accounts** and click the account name that you wish to archive. Click **Archive**.

View All Retirement Accounts

Demo - Retirement

Account: 7fb24a8b-a455 REC Quantity: 0

GENERAL INFORMATION Archive Edit

Account Type	Retirement
Name	Demo - Retirement
Status	Open

2. A confirmation request will appear. Review the information and click **Ok**.

Are you sure you want to archive this account?

Cancel OK