Introduction

WREGIS users may use an upload file to initiate certificate transfers rather than the standard User Interface (UI). This function was built to handle large volumes of transfer activity, both external and internal. It cannot be used to initiate export, retirement, or reserve transactions.

All external transfers initiated via file upload will still require the receiving organization to accept the certificates. Instructions for accepting a certificate transfer or using the UI to initiate certificate transfers can be found here.

Data File Specifications

The Mass Certificate Transfer file must be in .CSV format and has a line limit of 1,000 per file. If one line fails a system validation, the entire file will be rejected. A file header is required, with all five fields listed.

You must leave one field blank depending on whether the transfer is internal or external. Read carefully to ensure that you have the right fields for the transfer type you are initiating. An example file will be made available upon request.

Field	Definition	Comments
serial_number	The serial number of the batch of RECs you are transferring (all or part).	**Example:** 99999-AA-123456-1-100 (RECs issued prior to November 2022 may have a different format.)
quantity	The total number of RECs you are transferring from the batch.	
to_organization*	The Organization ID to which you are transferring the RECs. *Required for external transfers, leave blank for internal transfers.*	Organization IDs start with an 'A' and are followed by a one to four digit number. **Examples:** A1 or A9999
to_account*	The Active Account ID to which you are transferring the RECs. *Required for internal transfers, leave blank for external transfers.*	You can only transfer RECs to <u>Active</u> Accounts using the MCT function. **Example:** 1234ABCD-55ZZ
notes	An optional field for transaction notes that will be visible to both the sender and the recipient.	Character Limit: 50

* Either the to_organization or the to_account field is required, with the unused field left blank. Submitting a line with both values will cause a system error.
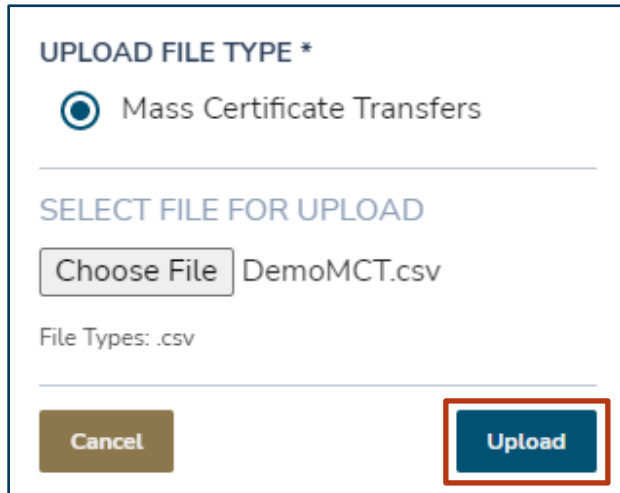
Process

1. Navigate to the **Active** tab in **Certificates** and click **Upload** in the top-right of the screen.
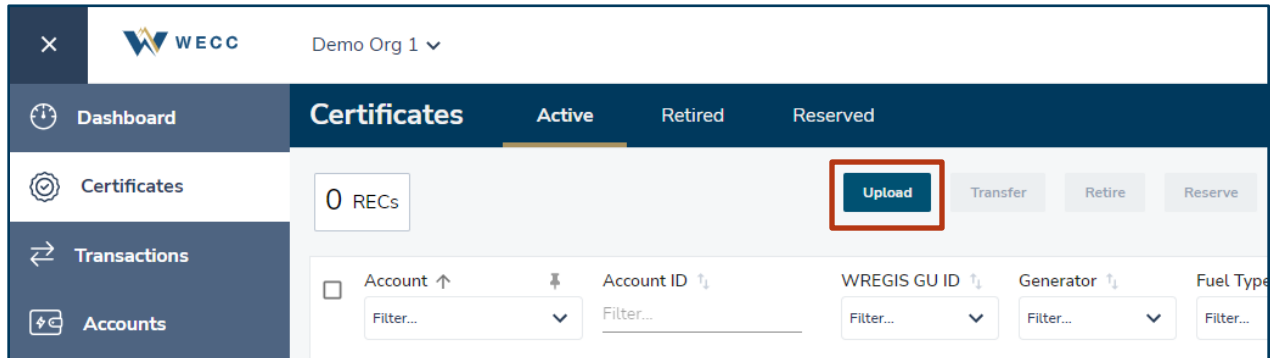
2. Choose the file you wish to use and click **Upload**.

3. If the file is in the correct format, you will see a success message, and the system will send you an email. If there are issues with processing any of the individual transaction lines, the system email will list the incorrect lines and reasons; the full file will be rejected and will need to be corrected before reloading.
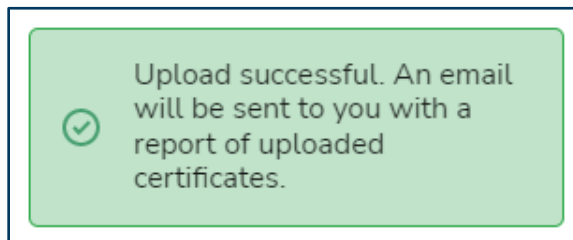
Dear Alice Regional,

A recent mass certificate transfer upload has failed a validation check. Details for this upload are as follows.