Multi-Account User Guide

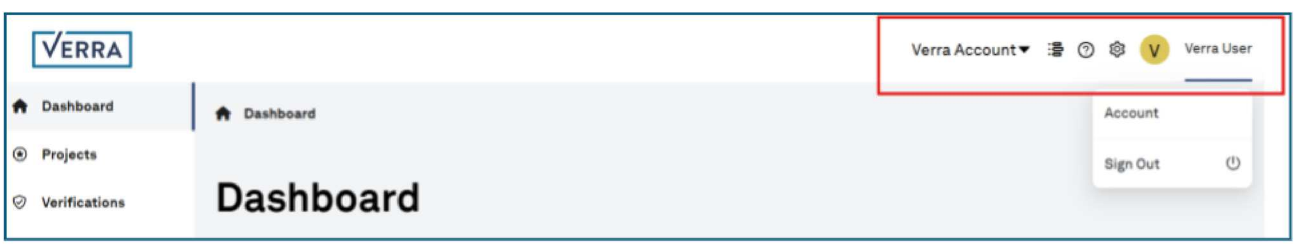
A single authenticated user (one email address login) can be associated with multiple registry accounts in the New Registry. The default account which a user logs into initially is determined based on the following criteria hierarchy:

1. If the user is the account manager in only one of the multiple approved accounts, they log into that account by default.
2. Where the user is the account manager in multiple accounts, the oldest of their approved accounts (or lowest account ID) is the default account.
3. Where the user has the same role in all their accounts, e.g. Account Contributor, the oldest of these is the default account.
4. Also, where the user has the same role, priority is given to certain account types, with project developer account types defaulted first, followed by trader and retail aggregator account types.

After signing in, users can view consolidated information from all approved accounts, including projects, units, issuances, transfers, invoices, and activity logs. But their view will change depending on the account type (i.e. projects will only be viewable under project developer accounts).

While users can view all consolidated inter-account transfers in their incoming and outgoing pending transfer tabs, only the destination account can accept or reject the pending transfer, and only the source account can revoke the pending transfer.

Users with access to multiple accounts can switch between them using the Account Selector, highlighted in the image below in the upper right corner of the screen. This allows access to account-specific information and functions, such as billing details. Regardless of which account the user has selected, all actions will take place in the account holding the project or units. For instance, if a user retires units that are held in a different account, they have access to but are not currently viewing; the retirement will still be reflected in the other account.



Users with access to multiple accounts retain the role assigned to them in each account. For example, a user may be an Account Administrator in one account and a Account Contributor in another, with permissions applied according to the selected account.

Suspended, rejected, and closed accounts are excluded from the multi-account view. These accounts do not appear in the Account Selector, and their data is not visible to the user.

Billing details, account balances, subscriptions, and billing contacts remain specific to each account. While invoices from all active accounts are consolidated in the Invoices Grid. Account-level billing information (balance, subscription, and billing contact) is displayed separately for each account on the Account Overview page.