

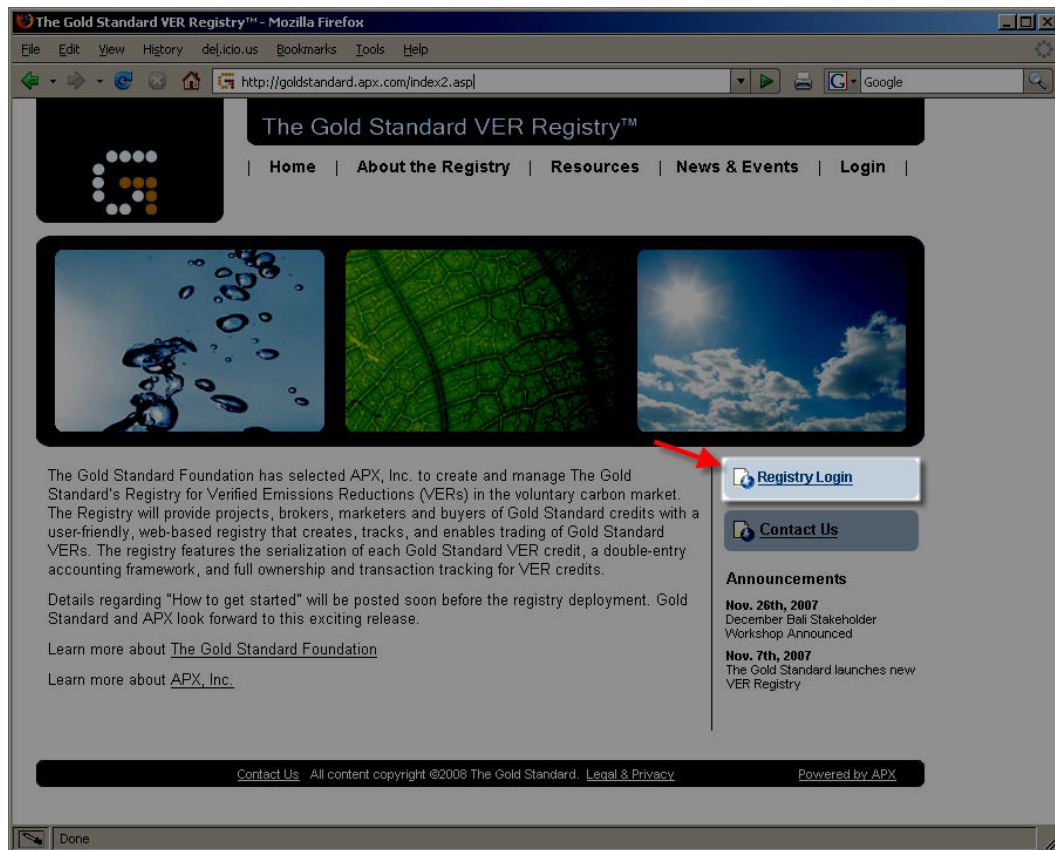


Getting Started Guide for General Account Holders

Account Registration

Access the Gold Standard Registry Login Screen:

1. Go to <http://goldstandard.apx.com> (screenshot below)
2. Click on the link highlighted in the screenshot below **Registry Login**



3. This link will open the registry login screen
4. Click on the hyperlink **Not a Member? Register Here** (highlighted in the screenshot below)



The Gold Standard
Premium quality carbon credits

Help

Login

Login Name:

Password:

Login

Remember My Login Name

[Trouble logging in?](#)

[Not a Member? Register Here](#)

Message Notification - last 30 days

Total Messages: 0

Message Type	Message	Receive Date
No Records!		

[More...](#)

Public Reports

- [Account Holders](#)
- [VER Projects](#)
- [VER Project Credits](#)
- [VER Status by Serial Number](#)
- [Public Retirement Sub-Accounts](#)
- [Retired VER Credits](#)
- [Gold Standard CDM/JI Projects](#)
- [Gold Standard Certified CERS/ERUs](#)

5. A checklist pop-up will appear describing the steps required to register for an account. Select the General Account Type and click the **Continue Registration** button.
6. Complete the **New Account Application** form and press the **Submit for Approval** button. *Note: It will be possible for the public to view the Organization information you provide. Mark the account as a Private Account if you would prefer that no one other than the Gold Standard and APX know of your account in the Gold Standard Registry.*
7. An “Activation” email will be sent to the Account Manager email address entered into the **New Account Application** form. Follow the instructions on the email to activate your new account. This will trigger a notification to the Registry Administrator that a new account application has been submitted.
8. Review and sign the Terms of Use document. Then send it to the Gold Standard following the instructions on the checklist pop-up. Once the Terms of Use is received, the Gold Standard will review the submitted account application.
9. You will receive an email when your account is approved. All registry functionality available to your Account Type will be accessible.



Registry Navigation

The main account screen or “homepage” is referred to as the Dashboard. The Dashboard is the screen that first appears when you login and is a central hub that facilitates the use of the software. The Dashboard makes it easy and intuitive to access functions or view summary information about their account. Each colored block represents a module that is used to display account information and/or provide you with links to application functions. Comprehensive help screens are available by clicking on the “Help” and “?” links. The Help link is always located in the upper right corner of the screen.

The rest of this Getting Started document refers to the Dashboard screenshot below.

The screenshot shows the APX Dashboard interface. At the top, it displays the user's name 'Welcome, apx1' and account number 'Account: 13880'. The dashboard is divided into several modules:

- Registration:** Includes a 'Change Profile' link.
- Account Management:** Includes a 'Review/Edit/Add Logins' link.
- Inbox:** A table for certificates with columns: From, Quantity, Status, Confirm, Reject. It is currently empty.
- Outbox:** A table for certificates with columns: To, Quantity, Status, Withdraw. It is currently empty.
- Account Holder Reports:** Includes links for 'My Event Log', 'My Sub-Accounts', 'My Credits', 'My Invoices', and 'VER Credit Transfer History'.
- Project Management:** A table with columns: Project ID, Project Name, Status, Validation DOE, Verification DOE, Documents, Emissions & Credits. It shows 'No Records!'. A callout points to the 'Register New Project' link, stating: 'Link to register a new project'.
- Credit Management:** Includes 'Account Activity' and 'Account Totals' sections. A callout points to the '0' value in the 'Active Sub-Accounts' row, stating: 'Quantity links to the account balance and credit transfer screens'.
- Open Sub-Accounts:** A table with columns: Sub-Account ID, Sub-Account Name, Sub-Account Name/Alias2, Type, VER Balance. It shows one active sub-account with ID 126 and name ABC. A callout points to the 'Create New Sub-Account' and 'View/Edit Sub-Accounts' links, stating: 'Links to create a view sub-accounts'.



Managing Credits

1. The first step is to obtain VER credits. VER credits are deposited into Registry accounts by the Registry Administrator in association with offset projects or through credit transfers from other account holders.
2. To obtain VER credits from other account holders you must agree to a deal for credits outside of the Gold Standard Registry. The owner of the credits will then transfer the credits to your account. Use the Inbox module to accept the transfer of credits into the account from the other account holder.
3. If you will be trading and retiring a large number of VER credits, the next step is to determine how you want to organize your credits. Those credits can then be organized and retired by account holders using active and retirement sub-accounts. There are no specific rules for how sub-accounts are to be used by account holders, so you must determine a sub-account structure that is best for your organization based on the properties of both active and retirement sub-accounts. You may choose to create sub-accounts that organize your credits by vintage, location, or even customer name. Key sub-account properties are listed below.
 - There is no limit to the number of active or retirement sub-accounts you can create.
 - Retirement sub-accounts are used to retire VER credits. Once a VER credit is transferred into a retirement sub-account, it cannot be moved out of the sub-account and is displayed to the public as retired.
 - Credits can be moved into and out of active sub-accounts.
 - You can choose to allow the public to view retirement sub-accounts. This means that the retirement sub-account name and the credits held within the retirement sub-account will be displayed to the public in the Public Retirement Sub-Accounts report. This feature allows you to make public details about retired credits. If you have chosen to have a Private account, the public will not see any identifying account information on the report, only details about the credits.
 - You can create special logins for your account that only allow users to view sub-accounts (and the credits held within them) that you specify. This feature allows you to provide specific people or organizations information about the credits that you hold are have retired.
4. Once you have determined how you want to organize your VER credits, use the links in the **Credit Management** module to create and view sub-accounts.
5. Once you have created your sub-accounts, use the credit quantity links in the **Credit Management** module to access the **Balance** and **Transfer** screens. They will allow you to move your VER credits into and out of active accounts and into retire credits.
6. View the **Account Holder** and **Public** reports to ensure that your credits are being managed and displayed as you envisioned they would be.



Credit Management				
Account Activity				
Credit				
Account				<u>165,000</u>
Active Sub-Accounts				0
Retirement Sub-Accounts				0
Account Totals				
Credit				
Credit Total				165,000
Open Sub-Accounts				
Total Sub-Account 3				
Sub-Account ID	Sub-Account Name	Sub-Account Name/Alias2	Type	VER Balance
143	Gold Standard VERS		Active Sub-Account	0
142	Client A Retirement 2008		Retirement Sub-Account	0
144	Client B Retirement 2008		Retirement Sub-Account	0
Create New Sub-Account				
View/Edit Sub-Accounts				

Quantity links to the account balance and credit transfer screens

Quantity links to the account balance and credit transfer screens

Figure 1 - Credit Management Module