**MarkeTrak Training 101 – Agenda**

1. What is MarkeTrak? DEBBIE
   1. recap from Retail 101-
   2. suggest on line MarkeTrak modules
   3. Difference between DEV & D2D –high level
2. General MarkeTrak Navigation – TAMMY/ERCOT
   1. personalizing dashboard- more quick tips
3. Bulk Inserts MONICA
4. Quick Reference Subtypes DEBBIE
   1. Carolyn’s sheet - provide handout
5. Day to Day Subtypes
   1. Usage & Billing –Sheri
      1. All subtypes – Usage & Billing , AMS LSE
   2. Switch holds – Jim
   3. Inadvertent Gains- Tomas
   4. Cancel w/Approval – Oncor/Debbie
      1. current timelines
      2. proposed changes
   5. Other - Monica
   6. Missing Transactions – Monica
   7. Safety Net order - Sheri
   8. Market Rule Sheri
   9. Siebel change - Sheri
   10. 997 issues - Sheri
   11. ­­Service Order 650 – Sheri
   12. Move Out with Meter Removal – Jim
   13. Rep of Record- Jim
   14. Service Address- Monica/Tomas
   15. Premise Type- Monica/Tomas
   16. Projects –Monica/Tomas
   17. Background Reports (ERCOT/TAMMY)
6. Data Extract Variances (DEVs) Carolyn
   1. higher level
   2. more common DEVs
7. Administration Workflows ERCOT/TAMMY
8. Email Notifications ERCOT/TAMMY
9. Reporting ERCOT/TAMMY
10. Listserves ERCOT/TAMMY