**Title: MarkeTrak Email Functionality**

The MarkeTrak application includes functionality that allows users to send emails and subscribe to a variety of email notifications. In this tutorial, we will review options for manually sending emails to other users from within MarkeTrak issues, what types of emails are auto generated from the MarkeTrak application, and an overview of MarkeTrak Notifications and how to elect to receive notification emails.

Let’s begin by discussing manual email functionality. There are three methods of manually sending emails from within a MarkeTrak issue. To send an email to a Market Participant who is an owner on the issue, the user can click on the email icon next to the name and duns number of the intended recipient. This method allows the user to send an email directly to the email address listed on the contact record for that user. The email subject line will include the name and duns number of the sender and the MarkeTrak issue id.

Another method of emailing from within an issue is to select the email icon on the toolbar located on the upper right side of the MarkeTrak issue. Recipient information is not pre-populated using this method. The user has the ability to find and select a specific contact associated with the issue.

The third method of emailing from within a MarkeTrak issue is to select the exclamation icon also located on the toolbar on the upper right side of the MarkeTrak issue. This functionality allows the user to send an email to the owner of the issue as well as the designated escalation contacts for the subtype of the issue. For example, CR1 is reviewing a Usage Billing-Dispute MarkeTrak issue. CR1 selects the exclamation icon to send an email to the TDSP, who is the Responsible MP on the issue, requesting information or action on the MarkeTrak issue. The To: line on the email will be pre-populated with the TDSP MP Owner on the issue as well as the designated Primary and Secondary escalation contacts for the Usage Billing-Dispute subtype. The email subject line will include the name and duns number of the sender, the MarkeTrak issue id, and the ESIID on the issue.

Emails sent from within a MarkeTrak issue are visible to all MPs Involved on the issue in the form of a note. Once the email message has been sent, it will be available for reference in the Notes section of the MarkeTrak issue from which it was sent.

Our next area for review is the MarkeTrak Notification system. The notification system controls automated emails sent from the MarkeTrak application to Market Participant escalation contacts. If triggered, MarkeTrak will generate one email per day per contact type. Included in each notification is an attachment (.csv format) containing issue specific information such as Issue ID, Date Submitted, and Date of Last Update. Receipt of an automated email notification is indication that an issue has surpassed the time allotted to complete a transition based on the issue sub type. Any issue included in the attachment that is not transitioned before the end of the day will be included in a similar email the following day. For example, CR1 submits a Cancel with Approval issue to TDSP A. The issue transitions to the TDSP in a state of *New* and the TDSP selects Begin Working. The issue is now in a state of *In Progress*. Per the escalation rules for the Cancel with Approval subtype, the issue must be transitioned to another state within 7 days. For our example, the issue remains in the state of *In Progress* for 7 days and the MarkeTrak system generates a notification email to the Primary and Secondary escalation contacts for the Cancel with Approval subtype for TDSP A. Market Participants should reference the MarkeTrak Users Guide for a complete list of events that will trigger notification emails.

In this tutorial, we’ve discussed how to send manual emails from within an issue as well as reviewing conditions that will generate an automated email to Market Participants. Now, let’s discuss how Market Participants can elect to receive notification emails regarding the status of an individual issue or a group of issues. This is a manual selection made within the MarkeTrak application from a list of 6 published notifications. These notifications are:

* MT- Issue has gone Pending Complete

*Email notification will be sent to the user if the issue enters the appropriate Pending Complete state for the workflow to which it is associated.*

* MT – Issue has gone Pending Complete –Unexecutable

*Email notification will be sent to the user if the issue enters the appropriate Unexecutable- Pending Complete state for the workflow to which it is associated.*

* MT – Issue acknowledged by Assigned MP (Begin Working)

*Email notification will be sent to the user when an MP selects the transition Begin Working which identifies the issue owner.*

* MT – DEVLSE item went to “Failed Analysis”

*Email notification will be sent to the user if the DEVLSE issue enters the state Failed Analysis as detailed in the DEVLSE section of this document.*

* MT – Issue has gone Closed by Submitter (DEV LSE)

*Email notification will be sent to the user if the Close button was selected on a DEV LSE issue sub-type.*

* MT – Background Report has been prepared

*Email notification will be sent to the user when the background report is complete.*

* Issues Auto Closed due to pending issue status

*Email notification will be sent to the user if the issue remains in a state of Pending Issue for more than 2 days.*

These selections can be made within an individual issue by clicking on the Actions dropdown field at the top right of the MarkeTrak screen. In the Actions dropdown field, select ‘Add Item Notification’. For this tutorial, we will illustrate a user electing to receive a notification when the issue has gone to Pending Complete. Once the selection has been made, the MarkeTrak issue will be updated to reflect the notification selection and the user will receive an email when the issue transitions to Pending Complete.

Another method of electing to receive notifications is thru the User Profile settings. Selecting notifications using this method is more universal than electing to receive a notification on an individual issue. For this example, we will illustrate a user who wants to receive a notification when all DEV LSE issues for their DUNS number are transitioned to a state of *Failed Analysis*. To subscribe to this notification, the user would click on their user profile at the top left of the MarkTrak screen. The user would then select the Notifications tab and click on the notification ‘MT-DEV LSE item went to “Failed Analysis”. The user can double click on the notification or use the arrow to move the notification to the Subscribed to: pane. The user would then click on Save Profile. The user will now receive an email when any DEV LSE issue for their DUNS number transitions to a state of *Failed Analysis*.

The MarkeTrak Administrator is responsible for maintaining the contact information for the users associated with their Market Participant organization. In addition, they are responsible for maintaining the rolodex of primary and secondary escalation contacts for their organization. It is important that accurate contact information is maintained to ensure all emails originating from the MarkeTrak application are sent to valid email addresses.