**Dallas 2017 Training**

May 3rd – RETAIL 101

May 4th – Inadvertent Gain/Loss Training

**RETAIL 101 – AGENDA**

9:00-9:10 Opening

9:10-9:55 Module 1 – History

9:55-10:05 BREAK

10:10-11:00 Module 2 – Roles

11:00-11:10 BREAK

11:10-11:50 Module 3 – Rules

11:50-12:45 LUNCH

12:45-1:25 Module 4 – Transactions

1:25-2:05 Module 5 – AMS – Jim

2:05-2:45 Module 5 – AMS – Sheri

2:45-2:55 BREAK

2:55-3:50 Module 6 – Data

3:50-4:10 Jeopardy

Suggested revisions to the slide deck:

* Slide 13 – add date 1995
* Slide 15 – add date 1999
* Slide 26 – reference ercot.com
* Slide 44 – registration to ERCOT and PUCT
* Slide 49 – manage “load for” retail…
* Slide 67 – remove 25.454
* Slide 69 – highlight ‘Unauthorized Change of REP’
* Slide 86 – semicolon after ‘Reconnects’

Attendance

Classroom – 16

WebEx – 16

**INADVERTENT GAIN/LOSS TRAINING – AGENDA**

9:00-9:10 Introductions & Opening

9:10-9:15 Opening

9:15-9:50 Rescission

9:50-10:10 BREAK

10:10-10:40 IAG Walkthrough

10:40-11:20 Best Practices

11:20-11:50 Reconciliation

11:50-1:05 LUNCH

1:05-1:55 Demo

1:55-2:15 BREAK

2:15-3:15 Reporting & Challenge

3:15-3:20 Wrap Up

Suggested revisions to slide deck:

* Slide 70 – remove ? at the end of the statement

Suggestion for Demo:

* Use a different resolution for hosting computer for the demo
* Demonstrating flow, homepage set up, and reporting is very good – might want to highlight the report used for each REP that contributes to the IGL Market Reporting data

NOTES for TDTMS follow up:

* Remove the “Send to TDSP” button for IGL workflow once complete

Attendance

Classroom –

WebEx –