



Mercury 3 Training Schedule

Existing Mercury Client Transition v4

The purpose of this five-day training session is to transition clients to Mercury 3.

Day One

Time	Topic
9:00-10:30 am	Introduction to Mercury 3 functionality, menus Overview of new functionality, glossary Introduction to Navigating Mercury <ul style="list-style-type: none"> • Navigation and Search Options • Introduction to Dynamic List Use • Introduction to Operations Use • Relationship between User Access and Navigation
10:30-10:45 am	Break
10:45-12:00 pm	Navigation, Continued
12:00-1:30 pm	Lunch
1:30-3:15 pm	Set-Up <ul style="list-style-type: none"> • Accounting (Accounts, Transaction Types, Rates, Web Payment Items) • Living Area (Communities, Buildings, Floors, Floor Sections, Suites, Rooms, Bed Spaces, Room Types) • Plans (Plan Types) • Profile (Contact Types, Categories) • Application (Application periods) • Lookup Lists • Custom Fields (New and Improved - Replaces Application User-Defined) • Flags (New and Improved) • New or updated Dataset and Global Utilities and Defaults
3:15-3:30 pm	Break
3:30-5:00 pm	Overview and Set-Up, Continued

Day Two

Time	Topic
9:00-10:30 am	People and Applications Home Menu Items <ul style="list-style-type: none"> • Profile – Create/Edit/View Individual Profile • New Profile (and Application) • Flags • Person History • Applications – New/Edit/View individual application People and Applications Dynamic Lists <ul style="list-style-type: none"> • Actions • More Actions (I want to...) • Actions for Selected
10:30-10:45 am	Break
10:45-12:00 pm	Correspondence Tools <ul style="list-style-type: none"> Email – Senders, Settings, Messages SMS – Settings and Messages Batch Correspondence Operation Editor and Context Data (New and Improved) Conditional Emails (New conditions and filters, preconfigured email) RMS Mail Merge transition to Batch Correspondence, sample conversion
12:00-1:30 pm	Lunch
1:30-3:00 pm	Using Operations <ul style="list-style-type: none"> • Batch Correspondence • Batch Update • Create Applications • Create Sort Order • Add Flags • Add Person History
3:00-3:15 pm	Break
3:15-5:00 pm	Waitlist Management <ul style="list-style-type: none"> • Waitlist Operations • Waitlist Component and Templates

Day Three

Time	Topic
9:00-10:30 am	Mercury 3 Bookings <ul style="list-style-type: none"> • Bed Space Nominated Lists and Plan Nominated Lists (New and Improved) • Roommate Matching Criteria (New and Improved) • Roommate Group Type/Named Roommate Groups • Template-based Bookings (Staff-facing Templates) • Intellassign • Sample Qualification Criteria Conversion
10:30-10:45 am	Break
10:45-12:00 pm	Mercury 3 Bookings, Continued
12:00-1:30 pm	Lunch
1:30-3:00 pm	Bed Space and Plan Management Dynamic Lists and Related Operations <ul style="list-style-type: none"> • Check-In and Check-Out • Change Dates (Rooms and Plans) • Change Rates (Rooms and Plans) • Create Break (Rooms and Plans) • Delete Bookings (Rooms and Plans) • Room Swap • Change Room • Change Plan Bed Space Configuration Dynamic List <ul style="list-style-type: none"> • Adjusting Bed Space configurations • Create New Closure Bed Space Closure Dynamic List <ul style="list-style-type: none"> • Manage Closures
3:00-3:15 pm	Break
3:15-5:00 pm	Bed Space And Plan Management, continued

Day Four

Time	Topic
9:00-10:15 am	Inspections <ul style="list-style-type: none"> • Set-Up • Templates • Operations
10:15-10:30 am	Break
10:30-12:00 pm	Inspections, Continued Maintenance <ul style="list-style-type: none"> • Set-Up • Templates and Home Menu
12:00-1:30 pm	Lunch
1:30-3:15 pm	Accounting Operations <ul style="list-style-type: none"> • Charges and Credits • Fee Assessment • Other Accounting Operations Make Payment Payment Results Ledger
3:15-3:30 pm	Break
3:45-5:00 pm	Templates and Components <ul style="list-style-type: none"> • Updates to Template Data Wizard • Staff vs People Login • Person Selector Page Mapping New Components <ul style="list-style-type: none"> • File Attachment • Other Occupants • Parking • Rate Calculator • Reports • Named Roommate Group • Plan Change • Waitlist Review New Reports

Day Five

Time	Topic
9:00-10:45 am	User Access <ul style="list-style-type: none">• Users• Roles• Permissions• Securables• Positions
10:45-11:00 am	Break
11:00-12:00 pm	Template Availability and Scheduling (New and Improved)
12:00-1:30 pm	Lunch
1:30-3:00 pm	Preparation for Mercury 3
3:00-3:15 pm	Break
3:15-4:00 pm	Wrap-Up