



Mercury 3 Foundation Training Schedule

The purpose of this five-day training session is to provide a broad overview of Mercury 3 functionality and use for new staff at existing Mercury 3 clients.

Day One

Time	Topic
9:00-10:30 am	Introduction to Mercury 3 Functionality and Menus Mercury Glossary of Terms Introduction to Navigating Mercury <ul style="list-style-type: none"> • Navigation and Search Options • Introduction to Dynamic List Use • Introduction to Operations Use • Introduction to Templates-Staff and Student Facing (Student Web) • Introduction to Filters Use
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 • Living Area, Room Types, and Mapping • Plans • Profile Look up Lists • Application • Room and Plan Lists • Other Lookup Lists • Custom Fields • Flags • 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
9:00-9:45 am	Correspondence Tools <ul style="list-style-type: none"> • Email – Senders, Settings, Preconfigured • SMS – Settings and Messages • Editor and Context Data • Create Preconfigured Email • Conditional Emails
9:45-10:30 am	Contracts <ul style="list-style-type: none"> • Manage • Generated
10:30-10:45 am	Break
10:45-12:00 pm	People Dynamic List <ul style="list-style-type: none"> • Actions for selected versus More Actions • Profile • Batch Correspondence • Batch Update • Add/Manage Flags • Add/Manage Person History
12:00-1:30 pm	Lunch
1:30-2:45 pm	Application Dynamic List <ul style="list-style-type: none"> • Application Periods and Fields • Roommate Matching • Batch Correspondence • Batch Update • Cancel Application • Create New Application Options
2:45-3:00 pm	Break
3:00-5:00 pm	Application and Roommate Group Templates <ul style="list-style-type: none"> • Work with an Application Template • Work with a Roommate Group Template

Day Three

Time	Topic
9:00-11:00 am	Bed Space Assigning <ul style="list-style-type: none"> • Staff facing Template-based Bookings (People versus Application) • Intellassign • How Filters Can Be Used
11:00-11:15 am	Break
11:15-12:00 pm	Student Facing Self Assignment Templates <ul style="list-style-type: none"> • Template Availability, Sorting, and Scheduling • Retention

	<ul style="list-style-type: none"> • Roommate Pull-in • General Room Selection
12:00-1:30 pm	Lunch
1:30-3:15 pm	Student Facing Self Assignment Templates continued
3:15-3:30 pm	Break
3:30-5:00 pm	Accounting Operations <ul style="list-style-type: none"> • Charges and Credits • Fee Assessment • Other Accounting Operations as Needed • Make Payment • Payment Results Ledger

Day Four

Time	Topic
9:00-10:15 am	Bed Space and Plan Management Dynamic Lists and Related Operations <ul style="list-style-type: none"> • Check-In and Check-Out • Auto Bill Adjustment Function and Settings • Change Dates (Rooms and Plans) • Change Bed Space • Change Plan • Change Rates (Rooms and Plans) • Create Break (Rooms and Plans) • Delete Bookings (Rooms and Plans) • Bed Space Swap 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
10:15-10:30 am	Break
10:30-12:00 pm	Bed Space and Plan Management continued
12:00-1:30 pm	Lunch
1:30-3:15 pm	Inspections <ul style="list-style-type: none"> • Set-Up • Templates • Operations
3:15-3:30 pm	Break
3:45-5:00 pm	Inspections, Continued Maintenance <ul style="list-style-type: none"> • Set-Up • Templates and Home Menu

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	Easy Report Builder
12:00-1:30 pm	Lunch
1:30-3:00 pm	Practice Time and Questions
3:00-3:15 pm	Break
3:15-4:00 pm	Wrap-Up