



# Mercury 3 Training Schedule

## Existing Mercury Client Transition v2

### \*\*Tentative Schedule\*\*

Please note that this agenda is still in development and subject to change over the coming months, prior to the release of Mercury 3.0

### Day One

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

## Day Two

Time	Topic
9:00-10:30 am	People and Applications Home Menu Items <ul style="list-style-type: none"> <li>• Profile – Create/Edit/View Individual Profile</li> <li>• New Profile (and Application)</li> <li>• Flags</li> <li>• Person History</li> <li>• Applications – New/Edit/View individual application</li> </ul> People and Applications Dynamic Lists <ul style="list-style-type: none"> <li>• Actions</li> <li>• More Actions (I want to...)</li> <li>• Actions for Selected</li> </ul>
10:30-10:45 am	Break
10:45-12:00 pm	Correspondence Tools <ul style="list-style-type: none"> <li>Email – Senders, Settings, Messages</li> <li>SMS – Settings and Messages</li> <li>Batch Correspondence Operation</li> </ul> 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"> <li>• Batch Correspondence</li> <li>• Batch Update</li> <li>• Add to Waitlist/Waitlist Management</li> <li>• Create Applications</li> <li>• Create Sort Order</li> <li>• Add Flags</li> <li>• Add Person History</li> </ul>
3:00-3:15 pm	Break
3:15-5:00 pm	Using Operations, continued

## Day Three

Time	Topic
9:00-10:30 am	Mercury 3 Bookings <ul style="list-style-type: none"> <li>• Bed Space Nominated Lists and Plan Nominated Lists (New and Improved)</li> <li>• Template-based Bookings (Staff-facing Templates)</li> <li>• Intellassign</li> <li>• Sample Qualification Criteria Conversion</li> </ul>
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	<p>Bed Space and Plan Management Dynamic Lists and Related Operations</p> <ul style="list-style-type: none"> <li>• Check-In and Check-Out</li> <li>• Change Dates (Rooms and Plans)</li> <li>• Change Rates (Rooms and Plans)</li> <li>• Create Break (Rooms and Plans)</li> <li>• Room Swap (??)</li> <li>• Delete Bookings (Rooms and Plans)</li> <li>• Change Room</li> <li>• Change Plan</li> </ul> <p>Bed Space Configuration Dynamic List</p> <ul style="list-style-type: none"> <li>• Adjusting Bed Space configurations</li> <li>• Create New Closure</li> </ul> <p>Bed Space Closure Dynamic List</p> <ul style="list-style-type: none"> <li>• Manage Closures</li> </ul>
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	<p>Accounting Operations</p> <ul style="list-style-type: none"> <li>• Charges and Credits</li> <li>• Fee Assessment</li> <li>• Other Accounting Operations</li> </ul> <p>Make Payment Payment Results Ledger</p>
10:15-10:30 am	Break
10:30-12:00 pm	<p>Templates and Components</p> <p style="padding-left: 20px;">Updates to Template Data Wizard Staff vs People Login Person Selector</p> <p>Page Mapping New Components</p> <ul style="list-style-type: none"> <li>• File Attachment</li> <li>• Other Occupants</li> <li>• Parking</li> <li>• Rate Calculator</li> <li>• Reports</li> <li>• Named Roommate Group</li> <li>• Plan Change</li> </ul>
12:00-1:30 pm	Lunch
1:30-3:15 pm	<p>Inspections</p> <ul style="list-style-type: none"> <li>• Set-Up</li> </ul>

	<ul style="list-style-type: none"> <li>• Templates</li> <li>• Operations</li> </ul>
3:15-3:30 pm	Break
3:45-5:00 pm	Inspections, Continued

### Day Five

Time	Topic
9:00-10:45 am	User Access <ul style="list-style-type: none"> <li>• Users</li> <li>• Roles</li> <li>• Permissions</li> <li>• Securables</li> <li>• Positions</li> </ul>
10:45-11:00 am	Break
11:00-12:00 pm	Template Availability and Scheduling (New and Improved)
12:00-1:30 pm	Lunch
1:30-2:45 pm	Maintenance Set-Up Templates and Home Menu
2:45-3:00 pm	Reports, Filters, and the File Exchange
3:00-3:15 pm	Break
3:15-4:00 pm	Introduction to Customization (Dynamic Lists, Operations, Home Menu)
4:00-5:00 pm	Wrap-Up