

How to Complete Emersion Standard Training During Onboarding

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Overview

This article is for service providers who are presently onboarding Emersion and need to complete the [Emersion standard training program](#).



Before commencing the Standard Training, we strongly recommend you complete [Emersion 101 training](#) first. Emersion training is presently undergoing a significant revamp under the Emersion Academy brand.

Emersion Academy-branded training supersedes the training provided in this program.

Accessing Standard Training

Emersion provides all new onboarding clients with a shared cloud storage location to:

- aid the transfer of larger files
- collaborate on documents during consulting sessions.

In this location is an **Emersion Standard Training** folder with sub folders for each training session in the table below.

Training sessions should be completed *in order*.

Session Guides

Read each session guide prior to completing the training. They will give you:

- What exactly is covered in the content.
- Prerequisites for the session
- Who the training is aimed at
- Essential readings

Our session guides are [located here](#).

Aligning Onboarding and Training

While it is important to complete the standard training program in its entirety, it is equally important to complete the training session at the right time during your onboarding journey. Take a session too early, and it is likely you will need to repeat it at a later date.

Emersion recommends using the table below as a guide as to when to complete each training session.

No	Start of*	Session	When should I do the session?	Then what?
1	Week 1	Introduction to Cumulus and Customer Management	Immediately after the project kick off.	Start getting your customer accounts into the system.
2	Week 1	Introduction to Packages and Plans	Immediately after the project kick off,	Gather all pricing and schedule your first plan construction consulting session
3	Week 1	Products and Product Management	Immediately after the project kick off.	Gather all pricing. Start getting products into the system.
4	Week 2	Invoice Templates and Global Invoicing Settings	Start of 2nd week	Configure your invoice template(s). Configure the global settings.
5	Week 2	Events	Start of 2nd week	Configure the events module and optional events as directed in your onboarding project plan
6	Week 3	Orders and Provisioning	When package plans, products and prices are finalised. Billing objects must be <i>Approved</i> and in a <i>Saleable</i> status.	Enter your services (subscriptions) in the system.
7	Week 4	Quarantine	As soon as usage is being mediated by Emersion, or 10 days before 1st bill run, whichever is earlier.	Process all quarantined usage.
8	Week 4	Invoicing, Billing and Payments	A few days before 1st bill run	Prepare for bill run, then execute.

* **Start Of:** Suggested times for taking each session, assuming a 4-week onboarding project. Taking the training session at the start of the week will provide the knowledge to complete the work tasks scheduled for that week.



Your [onboarding project plan](#) contains specific dates that you should complete training on. These dates have been selected based on your own project requirements and your intended go-live dates.

Related Pages

- [Training](#)
- [Emersion Training Video Index](#)
- [Product Training for Onboarding Clients](#)
- [Training Session Guide: Invoice Templates and Global Invoicing Settings](#)
- [Emersion Training 101](#)
- [Requesting New Service Types](#)
- [Training Session Guide: Invoicing, Billing and Payments](#)
- [Plan Construction - Planning Your Build](#)
- [Training Session Guide: Orders and Provisioning](#)
- [Training Session Guide: Packages and Plans](#)
- [Training Session Guide: Quarantine](#)
- [Training Session Guide: Products and Product Management](#)
- [Test Accounts and Services](#)
- [How to Complete Emersion Standard Training During Onboarding](#)
- [Training Session Guides](#)