

Emersion Training 101

[Go to full article](#)

Overview

If you are new to Emersion, you can get up to speed quickly these two streams of training videos, depending on whether you are an administrator or a user.

Emersion User Training

Emersion Academy: Emersion Training 101

This is a collection of short entry-level videos on Emersion that:

- cover the core processes that service providers need to understand to operate the system.
- designed to get users acquainted with the core system quickly.

Topic	Description	Time required
Getting Accounts into Emersion	Learn the basics of retail-level accounts and how to get them into Emersion easily.	12m 50s
Service Ordering, Activation and Service Management	Learn how to place orders for different types of services and manage the provisioning process in real time. Learn to process alterations to subscriptions in real time.	41m 57s
Product Purchases	Learn to process point-of-sale transactions and set up instalment plans.	13m 40s
Bill Runs and Billing	Prepare for a bill run by following our best-practice methods.	10m 47s
TOTAL TIME		1h 19m 14s



Emersion Acade...g 101 v1.0.pdf

Download this PDF presentation.

Use the links within the pages to access each video in this series.

Emersion Administrator Training

Emersion Academy: Administrator Training 101

This is a collection of videos that will assist administrators with setting up and configuring the system.

Video	Description	Time Required
Setting Up Your First Staff Administrator	This video demonstrates how to set up a staff account with full access privileges. It's aimed at those who are just starting their onboarding journey with Emersion and need to set up their first staff user account.	3m 14s
Introduction to Permissions and Powers	This video introduces the permissions area of Cumulus, and specifically how to control the level of access staff have to different areas of the system. It's aimed at all administrators who are responsible for setting up or configuring permissions within their company.	4m 35s
Setting Up Cumulus Staff Users	This video is a demonstration of how an admin from a wholesale or retail service provider can set up Cumulus accounts for their staff.	3m 23s
Role Configuration for Staff Users	This video explains how to customise Emersion's out-of-the box roles and organisational units, before staff users are added to the system. It follows on from our Introduction to Permissions and Powers video, and is aimed at administrators, who will be responsible for assigning staff members to roles and determining the access levels of each role.	4m 35s
Configure Global Settings for Accounts, Invoicing and Payments	This video explains how administrators from wholesale and retail service providers can configure default global settings for accounts, invoicing and payments. By setting up these default, administrators can define the standard settings for new accounts, choose how bills are managed, and automate features within the system.	3m 40s
Rebranding Cumulus	This video demonstrates how to make your company logo the default logo when accessing your instance of Emersion. It's aimed at administrators who are responsible for configuring the system for use.	1m 24s

Configure Global Settings for Ledger Mapping	This video demonstrates how to use your own ledger codes within Emersion. This is a useful tool for administrators who are onboarding with Emersion and configuring the system so that it's operationally ready.	3m 24s
Configure Global Settings for Automated Payments	This video demonstrates how to configure global settings for automated payments by setting up default BPay biller codes and surcharges for specific payment methods. It's aimed at administrators who need to set up the system so that customers can pay their bills using your accepted automated payment methods.	3m 31s
Configure Global Settings for Service Types	This video explains how administrator can override the default service type names with their own custom labels, to reflect the names that they are already using or would like to use.	4m 04s
Introduction to Invoice Templates	This video introduces Emersion's invoice templates. It covers what you need to know before you start configuring your first invoice template and what template items come out-of-the-box when you subscribe to Emersion. This video is aimed at administrators, who will be responsible for setting up and maintaining their company's invoice templates within the Emersion platform.	3m 22s
Selecting Your Invoice Template	This video introduces the different layout options that you can choose for your invoice templates. It's aimed at administrators, who will be responsible for setting up and maintaining the invoice templates.	1m 53s
Create a Custom Invoice Template	This video demonstrates how to can create a brand new invoice template using Emersion's most popular invoice layout. It's aimed at administrators, who will be responsible for setting up and maintaining invoice templates.	5m 47s
Testing Your Invoice Template Changes	In this training video, Administrators will learn how to utilise test accounts to preview a new invoice template, or changes that have been made to an existing invoice template.	4m 24s
Change the Invoice Template for a Customer	This video demonstrates how to change a customer's existing invoice template to a new invoice template. It's aimed at users who will be managing invoice layouts and assigning invoice templates to customers.	1m 45s
TOTAL TIME		



Our training videos are not public and can't be returned in a search. Emersion training videos can be accessed only with a direct link or URL.

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](#)