

CONCRETE QUOTATIONS

Lesson Plan - May 15, 2023 version

By the end of the *Concrete Quotations* course, the client and targeted users will be able to perform all the configurations and actions necessary to managing concrete quotations in **maestro***.

Unit CONCQUOT01 - Preliminary Analysis and Configuration

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
<p>The objective of this session is to clarify the needs, requirements, and conditions to using concrete quotations and set up the basic configurations that are linked to it in maestro*.</p> <p><i>PREREQUISITES</i></p> <ul style="list-style-type: none"> • Security Management; • Project Management; • Customer Discounts Table; • Catalogue Management. <p><i>OPTIONAL PREREQUISITE</i></p> <ul style="list-style-type: none"> • Concrete Tickets 	<ul style="list-style-type: none"> • Analysis; • Configuration (Concrete Tickets module) : <ul style="list-style-type: none"> • General. 	<ul style="list-style-type: none"> • Discuss the current and future process of concrete quotations (strengths and weaknesses); • Set up the required configurations for the implementation; • Decision-making. <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> • Reflect on the discussions. 	15 min.	<ul style="list-style-type: none"> • Training document CONCQUOT01 	Pilot

Unit CONQUOT02 - Configurations Linked to Concrete Tickets

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
<p>By the end of this training session, the client and designated users will be able to set and configure the necessary parameters to manage concrete tickets in maestro*.</p>	<ul style="list-style-type: none"> Concrete Formers and Transporters; Form Management. 	<ul style="list-style-type: none"> Review previous concepts and validate tasks completed as homework; Explanations and completion of the maestro* windows linked to concrete quotations, according to the client's needs and software requirements, to automate data entry. <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> <i>Finalize data entry.</i> 	<p>30 min.</p>	<ul style="list-style-type: none"> Training document CONQUOT02 	<p>Pilot and/ou super users</p>

Unit CONCQUOT03 - Concrete Quotation I01

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this training session, the client and designated users will be able to perform the operations linked to the processes and management of service quotations in maestro* .	<ul style="list-style-type: none"> Update configurations according to the decisions that were made; Concrete Quotations. 	<ul style="list-style-type: none"> Review previous concepts and validate tasks completed as homework; User training according to the process established at the time of the analysis; Demonstration of the different options and methods to manage concrete quotations in maestro*. <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> <i>Practice entering transactions.</i> 	1h	<ul style="list-style-type: none"> Training document CONCQUOT03 	Pilot and/or super users

Unit CONCQUOT04 - Operational Training on Concrete Quotations

Optional Session - Training of the client's employees with the implementation specialist

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this training session, the client and designated users will be able to perform the operations linked to concrete quotation processes and management in maestro* .	<ul style="list-style-type: none"> Update configurations according to the decisions that were made; Concrete Quotations. 	<ul style="list-style-type: none"> Review previous concepts and validate tasks completed as homework; User training according to the process established at the time of the analysis; Demonstration of the different options and methods to manage concrete quotations in maestro*. <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> <i>Practice entering transactions.</i> 	1h	<ul style="list-style-type: none"> Training document CONCQUOT03 	Pilot Super user and/or users

Unit CONQUOT05 - Analysis and Inquiry

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this training session, the client and identified users will be able to use the maestro* analysis and inquiry tools to find the information they need on concrete quotations.	<ul style="list-style-type: none"> Customer Statements by Quotation (after the billing of tickets). 	<ul style="list-style-type: none"> Review previous concepts and validate tasks completed as homework; Validate and configure concrete quotation inquiry reports. <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> Validate data entered in maestro*. 	30 min.		Pilot Super user and/or users

Unit CONCQUOT06 - Form Validation

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
<p>By the end of this lesson the client will be able to use the standard maestro* forms defined to meet their needs.</p>	<ul style="list-style-type: none"> Concrete Quotations Form; Account Statement by Quotation. 	<ul style="list-style-type: none"> Review previous concepts and validate tasks completed as homework; Adjust maestro* concrete quotation standard forms to print preset forms with the client's image. <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> <i>Validate the accuracy of the forms.</i> 	<p>To be Determined</p>		<p>Pilot</p>

Unit CONCQUOT07 - Tests and Validation

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this lesson, the client and designated users will have carried out the tests and verifications to validate the configurations made beforehand, and will be able to attest to the adequacy of these configurations with the established processes.	<ul style="list-style-type: none"> Customer Discounts Table. 	<ul style="list-style-type: none"> Review previous concepts and validate tasks completed as homework.; Assist with tests; Validate transactions; Validate reports and inquiries; Review configurations, if needed; Review processes, if needed. <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> Complete Integrated Tests. 	30 min.		Pilot Users

Unit CONCQUOT08 - Conclusion

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this lesson, the client will have shown they possess necessary knowledge and skills to manage accounts payable in maestro* .	<ul style="list-style-type: none"> Validate learnings; Review the security settings applied to the module. 	<ul style="list-style-type: none"> Prepare the next training lessons: <ul style="list-style-type: none"> Quarry Tickets. 	15 min.	Acquired knowledge verification form.	Pilot