

COST PLUS INVOICING

Lesson Plan - April 13, 2023 version

By the end of the *Cost Plus Invoicing* lesson, the client and targetted users will be able to use the cost plus invoicing method and its components.

Unit Cost+01 - Preliminary Analysis and Configuration

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
<p>By the end of this training session, the user will be able to understand the possibilities offered by cost plus invoicing in maestro* offers. They will be able to integrate it to their processes and operations.</p> <p>PREREQUISITES</p> <ul style="list-style-type: none"> • <i>Cost Transactions;</i> • <i>Document Management.</i> <p>OPTIONAL PREREQUISITES</p> <ul style="list-style-type: none"> • <i>Contact Management;</i> • <i>Mailing Configurations.</i> 	<ul style="list-style-type: none"> • Analysis; • Review the structure of project costs as cost plus; • Configuration (Contractual Billing module - Cost Plus / Construction Management). 	<ul style="list-style-type: none"> • Discussion on the current and futur cost plus invoicing process (strengths and weaknesses); • Explanation and completion of the basic configurations that will guide the implementation; • Decision-making. <p>HOMEWORK</p> <ul style="list-style-type: none"> • <i>Reflect on the discussions.</i> 	30 min.	<ul style="list-style-type: none"> • Training document COST+01 	Pilot

Unit Cost+02 - Necessary Cost Plus Invoicing Settings

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
<p>By the end of this training session, the user will be able to set up the necessary configurations to using cost plus invoicing in maestro*.</p>	<ul style="list-style-type: none"> • Configuration of Billing Rate for Premiums; • Billing Groups; • Contract Management. 	<ul style="list-style-type: none"> • Review previous notions and homework; • Explanation and completion of the different windows linked to cost plus invoicing, 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 database entry.</i> 	<p>1h</p>	<ul style="list-style-type: none"> • Training document COST+02 	<p>Pilot and/or Super User</p>

Unit Cost+03 - Cost Plus Invoicing 101

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 up and use cost plus invoicing in maestro*.</p>	<ul style="list-style-type: none"> • Update configurations according to decisions that were made; • Invoice Preparation; • Invoicing Report; • Invoicing; • Cancel a Sale; • Print Invoices. 	<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; • Demonstrate the different options and ways to use cost plus invoicing with maestro*. <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> • <i>Practice entering transactions.</i> 	<p>1.5h</p>	<ul style="list-style-type: none"> • Training document COST+03 • Integrated tests 	<p>Pilot and/or Super-Users</p>

Unit Cost+04 - Operational Training on Cost Plus Invoicing

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

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 up and use the cost plus invoicing functionality in maestro*.</p>	<ul style="list-style-type: none"> • Update configurations according to decisions that were made; • Invoice Preparation; • Invoicing Report; • Invoicing; • Cancel a Sale; • Print Invoices. 	<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; • Demonstrate the different options and ways to use cost plus invoicing with maestro*. <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> • Practice entering transactions. 	<p>1.5h</p>	<ul style="list-style-type: none"> • Training document COST+03 	<p>Pilot and/or Users and/or Super-Users</p>

Unit Cost+05 - Analysis and Inquiry

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
<p>By the end of this training session, the client and identified users will be able to use maestro* reports and analysis and inquiry tools to find the information they need concerning cost plus invoicing.</p>	<ul style="list-style-type: none"> Work in Progress. 	<ul style="list-style-type: none"> Review of previous concepts and validation of completed tasks as homework; <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> Validate data entered in maestro*. 	<p>1h</p>		<p>Pilot</p> <p>Super User and/or Users</p>

Unit Cost+06 - Form Validation

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
<p>By the end of this lesson the customer will be able to use the standard maestro* forms defined to meet their needs.</p>	<ul style="list-style-type: none"> Invoicing. 	<ul style="list-style-type: none"> Review previous concepts and validate tasks completed as homework; Validate and describe the changes that must be made to the cost plus invoicing forms, if needed. <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 Cost+07 - 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"> • Invoice Preparation; • Invoicing. 	<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 settings, if needed; • Review processes, if needed. <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> • Complete integrated tests. 	1.5h		Pilot Users

Unit Cost+08 - Conclusion

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this training session, the client will have shown they possess the necessary knowledge and skills to using cost plus invoicing 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 session according to the plan. 	30 min.	Acquired competencies form.	Pilot