

LIEN (CUSTOMER)

Lesson Plan - May 15, 2023 version

By the end of the *Lien (Customer)* course, the client and targeted users will be able to perform all actions that are necessary and linked to managing liens in **maestro***, such as sending liens and releases, as well as linking these to contracts and sales.

Unit LIEN01 - Preliminary Analysis and Configuration

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
<p>The objective of this lesson is to clarify the needs, requirements, and conditions to using liens with maestro*.</p> <p><i>PREREQUISITES</i></p> <ul style="list-style-type: none"> • <i>Project Management;</i> • <i>Security Management;</i> • <i>Customer Management;</i> • <i>Accounts Receivable Management;</i> • <i>Contact Management.</i> <p><i>OPTIONAL PREREQUISITES</i></p> <ul style="list-style-type: none"> • <i>Contract Management;</i> • <i>Receipt Management;</i> • <i>Contractual Billing.</i> 	<ul style="list-style-type: none"> • Analysis; • Configurations. 	<ul style="list-style-type: none"> • Discuss the current and future process to managing liens (strengths and weaknesses); • Decision-making. <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> • <i>Reflect on the discussions.</i> 	15 min.	<ul style="list-style-type: none"> • Training document LIEN01 	Pilot

Unit LIEN02 - Lien Management 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 the necessary configurations to managing liens with maestro*.</p>	<ul style="list-style-type: none"> Lien Management. 	<ul style="list-style-type: none"> Review previous concepts and validate tasks completed as homework. Explanations of and completiong of the fields in the Lien Management option, 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 LIEN02 	<p>Pilot and/ou super users</p>

Unit LIEN03 - Lien Management 201

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 perform operations linked to liens in maestro*.</p>	<ul style="list-style-type: none"> • Sending a lien; • Sending a release; • Linking a lien to the contract; • Linking a lien to sales. 	<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 ways to manage liens in maestro*. <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> • <i>Practice entering transactions.</i> 	<p>1h</p>	<ul style="list-style-type: none"> • Training document LIEN03 	<p>Pilot and/or super users</p>

Unit LIEN04 - Operational Training of Liens

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 perform operations linked to liens in maestro*.</p>	<ul style="list-style-type: none"> • Sending a lien; • Sending a release; • Linking a lien to the contract; • Linking a lien to sales. 	<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 ways to manage liens in maestro*. <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> • Practice entering transactions. 	<p>1h</p>	<ul style="list-style-type: none"> • Training document LIEN03 	<p>Pilot and/or super users</p>

Unit LIEN05 - 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 the maestro* analysis and report tool to find the information they need to manage liens.</p>	<ul style="list-style-type: none"> List of Liens; Lien Report. 	<ul style="list-style-type: none"> Review previous concepts and validate tasks completed as homework; Validate lien reports and inquiries. <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> Validate data entered in maestro*. 	<p>30 min.</p>		<p>Pilot</p> <p>Super user and/or users</p>

Unit LIEN06 - 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"> Lien forms; Partial and full release forms. 	<ul style="list-style-type: none"> Review previous concepts and validate tasks completed as homework; Adjust the maestro* lien and release standard forms to print the preset forms set up 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 LIEN07 - 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 Inquiry. 	<ul style="list-style-type: none"> Review previous concepts and validate tasks completed as homework; Test Assistance; Transaction Validations; Validation of reports and inquiry; Review of configurations, if needed; Review of the processes, if needed. <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> Complete Integrated Tests. 	30 min.		Pilot Users

Unit LIEN08 - Conclusion

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this training session, the client will have shown the have the necessary skills and knowledge to manage liens 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 future training sessions. 	15 min.	Acquired competencies form.	Pilot