INVENTORY

Lesson Plan - October 19, 2021

At the end of the *Inventory* lesson, the customer and targeted users will be able to perform all the necessary configurations and actions to manage an inventory in **maestro***.

Unit INV01 - Preliminary Analysis and Configuration

Date: Time: Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience

The objective of this lesson is to clarify the needs, requirements, and conditions to perform the basic configurations linked to inventory management in **maestro***.
 	
PREREQUISITES
 	
• *Security;*
• *Projects;*
• *Catalogue Management;*
• *Stock Order from Catalogue.*
	• Analysis;
	• Creation of the general ledger accounts for the project's activities;
	• Define Sites;
	• Configurations (**Purchasing** module):
	   • General;
	   • Inventory;
	   • Stock Order from Catalogue;
	   • Return of Merchandise;
	   • Receipt of Goods.
		• Discussion on the current and future process of inventory management (strengths and weaknesses);
		• Discussion on the types of transactions that can be entered in **maestro*** (specific cases);
		• Creation of project templates and projects for the inventory
		• Set up of the required configurations for the implementation;
		• Discussion on the use of the catalogue;
		• Decision-making.
		
		HOMEWORK
		
		• *Reflect on the discussions.*
			3h	• Training document INV01	Pilot

Unit INV02 Inventory Cycle and Operations

Date: Time: Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this lesson, the client and designated users will be able manage the inventory in **maestro***.	- Inventory to Project Transfer; - Inventory to Project Transfer Adjustment - Internal Sales; - Inventory-Site Transfer; - Inventory Adjustment; - Material Reservation; - Inventory Issures; - Physical Inventory Count; - Variance Report.	- Review of previous concepts and validation of completed tasks as homework; - Explanation and completion of the windows linked to catalogue management in **maestro***, according to the client's needs and the software's requirements, to automate data entry; - Import of the catalogue database using an *Excel* file, if needed; - Decision-making. *HOMEWORK* *Practice entering transactions.*	3h	Training document INV02	Pilot and/or Super Users

Unit INV03 - Operational Training on the Inventory Cycle

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 lesson, the client and designated users will be able manage the inventory in **maestro***.	- Inventory to Project Transfer; - Inventory to Project Transfer Adjustment - Internal Sales; - Inventory-Site Transfer; - Inventory Adjustment; - Material Reservation; - Inventory Issures; - Physical Inventory Count; - Variance Report.	- Review of previous concepts and validation of completed tasks as homework; - Explanation and completion of the **Catalogue** option windows in **maestro***, according to the client's needs and the software's requirements, to automate data entry; - Import of the catalogue database using an *Excel* file, if needed; - Decision-making. *HOMEWORK* *Practice entering transactions.*	3h	Training documents - INV02	Pilot Super Users Users

Unit INV04 - Analysis and Inquiry

Date: Time: Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this lesson, the client and identified user will be able to use **maestro***'s analysis and report tools to find the information they need to perform inventory follow-ups.	- Catalogue Inquiry; - Inventory Miscellaneous Reports; - Pivotal Analysis by Identification; - Pivotal History Analysis; - Transaction Inquiry; - Pivotal Reservation Analysis; - Average Cost Validation.	- Review of previous concepts and validation of completed tasks as homework; - Validation of reports and inventory inquiry. - Inventory correction methodology. *HOMEWORK* *Validate data entered in* ***maestro****.	3h		Pilot Super Users Users

Unit INV05 - Form Validation

Date: Time: Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience

By the end of this lesson the client will be able to use the standard **maestro*** forms defined to meet their needs.	• Transfer orders:
	  • Inventory to Project Transfer;
	  • Inventory-Site Transfer;
	  • Internal Sales;
	  • Material Reservation;
	• Labels (shelves).
		• Review of previous concepts and validation of completed tasks as homework;
		• Validation and identification of changes to be made to the required forms to manage inventory, if needed
		
		HOMEWORK
		
		• *Validate the accuracy of the forms*
			To be Determined		Pilot

Unit INV06 - 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.	• Validation of the process; • Validation of average costs and quantities; • Validation of accounting entries; • Balancing the inventory with the general ledger accounts.	• Review of previous concepts and validation of completed tasks as homework; • Test Assistance; • Transaction validations. • Validation of reports and inquiry; • Review of configurations, if needed; • Review of the processes, if needed. *HOMEWORK* • *Complete integrated tests*	8h		Pilot Users

Unit INV07 - Conclusion

Date: Time: Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience

By the end of this lesson, the client will have shown the necessary knowledge and skills to manage the inventory in **maestro***.	• Validate learnings;
	• Review the security settings applied to the module.
		• Preparation of the next training lessons:
		  • MRP;
		  • Customer Orders;
		  • Equipment Rental;
		  • Mobile - Service.
			1h	Aquired competencies Form - INV	Pilot

maestro ✦ technologies