

# CONSTRUCTION MANAGEMENT BILLING

## Lesson Plan - March 21 2023

By the end of the *Construction Management Billing* lesson, users will be able to perform the invoicing method in **maestro\*** and its different characteristics and functionalities.

## Unit CONSTMANAG01 - Preliminary Analysis and Configuration

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
<p>This objective of this lesson is to clarify the needs, requirements, and conditions to using the <b>Construction Management Billing</b> method in <b>maestro*</b>.</p> <p><i>PREREQUISITES</i></p> <ul style="list-style-type: none"> <li>• <i>General Ledger;</i></li> <li>• <i>Project Management;</i></li> <li>• <i>Security Management;</i></li> <li>• <i>Document Management;</i></li> <li>• <i>Cost Transactions.</i></li> </ul> <p><i>OPTIONAL PREREQUISITES</i></p> <ul style="list-style-type: none"> <li>• <i>Document Management.</i></li> </ul>	<ul style="list-style-type: none"> <li>• Analysis;</li> <li>• Review the project costs structure;</li> <li>• General Settings (<b>Contractual Billing</b> module):               <ul style="list-style-type: none"> <li>• Cost Plus / Construction Management</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Discuss the current and future construction management billing process (strengths and weaknesses);</li> <li>• Perform the basic configurations required for implementation;</li> <li>• Make the decisions.</li> </ul> <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> <li>• <i>Reflect on the discussions.</i></li> </ul>	30 min	<ul style="list-style-type: none"> <li>• Training document CONSTMANAG01</li> </ul>	Pilot

## Unit CONSTMANAG02 - Configurations - Construction Management Project

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
<p>By the end of this lesson, the client and designated users will be able to define and set up the necessary parameters to using the functionalities linked to construction management projects in <b>maestro*</b>.</p>	<ul style="list-style-type: none"> <li>Define Project Templates;</li> <li>Project Management;</li> <li>Define Selling Rates for Bonuses;</li> <li>Billing Groups;</li> <li>Construction Management Contracts.</li> </ul>	<ul style="list-style-type: none"> <li>Review previous concepts and validate tasks completed as homework;</li> <li>Explanation and completion of the different management windows linked to construction management billing, according to the client's needs and system requirements, to automate data entry.</li> </ul> <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> <li><i>Finalize date entry.</i></li> </ul>	<p>1h</p>	<ul style="list-style-type: none"> <li>Training document CONSTMANAG02</li> </ul>	<p>Pilot and/or Super Users</p>

## Unit CONSTMANAG03 - Operations - Construction Management Project 101

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this session, the client and designated users will be able to use the functionalities linked to construction management projects in <b>maestro*</b> and to understand all processes linked to it.	<ul style="list-style-type: none"> <li>Update settings according to the decisions the client has made;</li> <li>Construction Management Invoice Preparation;</li> <li>Construction Management Billing;</li> <li>Cancel a Sale;</li> <li>Print Invoices.</li> </ul>	<ul style="list-style-type: none"> <li>Review previous concepts and validate tasks completed as homework;</li> <li>User training according to the process established at the time of the analysis;</li> <li>Demonstration of the different options and ways to generate invoices.</li> </ul> <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> <li>Practice entering transactions and validate the discussed processes.</li> </ul>	1.5h	<ul style="list-style-type: none"> <li>Training document CONSTMANAG03</li> <li>Integrated Tests</li> </ul>	Pilot and/or Super Users

## Unit CONSTMANAG04 - Operational Training - Construction Management Projects

### 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 session, the client and designated users will be able to use the functionalities linked to construction management projects in <b>maestro*</b> and to understand all processes linked to it.	<ul style="list-style-type: none"> <li>Update settings according to the decisions the client has made;</li> <li>Construction Management Invoice Preparation;</li> <li>Construction Management Billing;</li> <li>Cancel a Sale;</li> <li>Print Invoices.</li> </ul>	<ul style="list-style-type: none"> <li>Review previous concepts and validate tasks completed as homework;</li> <li>User training according to the process established at the time of the analysis;</li> <li>Demonstration of the different options and ways to generate invoices.</li> </ul> <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> <li><i>Practice entering transactions and validate the discussed processes</i></li> </ul>	1.5h	<ul style="list-style-type: none"> <li>Training document CONSTMANAG03</li> </ul>	Pilot Super Users and/or Users

## Unit CONSTMANAG05 - Analysis and Inquiry

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this lesson, the client will be able to view all construction management project data.	<ul style="list-style-type: none"> <li>Billing Report;</li> <li>Works in Progress.</li> </ul>	<ul style="list-style-type: none"> <li>Review previous notions and validate tasks completed as homework;</li> <li>Validate and set up the reports and inquiries for construction management projects.</li> </ul> <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> <li>Validate the accuracy of the forms</li> </ul>	1h	<ul style="list-style-type: none"> <li>Training Document CONSTMANAG05</li> </ul>	Pilot Super Users and/or Users

## Unit CONSTMANAG06 - 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 construction management project forms set up to meet their needs.	<ul style="list-style-type: none"> <li>Construction Management Billing.</li> </ul>	<ul style="list-style-type: none"> <li>Review previous notions and validate tasks completed as homework;</li> <li>Validate and make the necessary changes to the Construction Management Project forms.</li> </ul>	To be determined		Pilot

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
		<p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> <li>• <i>Validate the accuracy of the forms.</i></li> </ul>			

## Unit CONSTMANAG07 - Tests and Validation

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
<p>By the end of this lesson, the customer 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.</p>	<ul style="list-style-type: none"> <li>• Construction Management Invoice Preparation;</li> <li>• Construction Management Billing.</li> </ul>	<ul style="list-style-type: none"> <li>• Review previous concepts and validate tasks completed as homework;</li> <li>• Assist with tests;</li> <li>• Validate transactions;</li> <li>• Validate reports and inquiries;</li> <li>• Review settings if needed;</li> <li>• Review processes if needed.</li> </ul> <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> <li>• <i>Complete Integrated Tests.</i></li> </ul>	<p>1.5h</p>		<p>Pilot and/or Users</p>

## Unit CONSTMANAG08 - Conclusion

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this lesson, the client will have shown they have the possess the necessary knowledge and skills to using the functionalities linked to construction management projects in <b>maestro*</b> .	<ul style="list-style-type: none"><li>• Validate learnings;</li><li>• Review the security settings applied to the module.</li></ul>	<ul style="list-style-type: none"><li>• Prepare the next training sessions according to the set plan.</li></ul>	30 min	Aquired competencies Form - CONSTMANAG	Pilot