

HOMEBUILDER SALES

Lesson Plan - May 2, 2023 version

By the end of the *Homebuilder Sales* course, the client and targeted users will be able to perform all configurations and actions necessary to managing the module in **maestro***.

Unit HOMEBS01 - 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 homebuilder sales and setting up the basic configurations linked to using that module in maestro*.</p> <p><i>PREREQUISITES</i></p> <ul style="list-style-type: none"> • <i>Project Management</i> • <i>Security Management</i> • <i>Accounts Receivable</i> • <i>Accounting</i> <p><i>OPTIONAL PREREQUISITES</i></p> <ul style="list-style-type: none"> • <i>N/A</i> 	<ul style="list-style-type: none"> • Analysis; • Configuration (Homebuilder Sales module). 	<ul style="list-style-type: none"> • Discuss the current and future process to manage homebuilder sales (strengths and weaknesses); • Set up of the required configurations for the implementation; • Decision-making. <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> • <i>Reflect on the discussions.</i> 	30 min.	<ul style="list-style-type: none"> • Training document HOMEBS01. 	Pilot

Unit HOMEBS02 - Configurations Linked to Homebuilder Sales

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 managing homebuilder sales with maestro*.</p>	<ul style="list-style-type: none"> • Bank Branches; • Model Management; • Price by Model Management. 	<ul style="list-style-type: none"> • Review previous concepts and validate tasks completed as homework; • Explanations and completion of the windows in maestro* linked to managing homebuilder sales, 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>45 min.</p>	<ul style="list-style-type: none"> • Training document HOMEBS02. 	<p>Pilot and/or super users</p>

Unit HOMEBS03 - Homebuilder Sales 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 manage homebuilder sales in maestro*.</p>	<ul style="list-style-type: none"> • Update configurations according to the decisions that were made; • Purchase Offer; • Customer Advance (optional); • Mortgage Advance (optional); • Interest Disbursement (optional); • Mortgage Payment (optional); • Cancel a Mortgage Disbursement (optional); • Homebuilder Sales; • Enter a Receipt; • Cancel a Receipt; • Print Cheques. 	<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 enter homebuilder sales in maestro*. <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> • <i>Practice entering transactions.</i> 	<p>2h</p>	<ul style="list-style-type: none"> • Training document HOMEBS03. 	<p>Pilot and/or super users</p>

Unit HOMEBS04 - Operational Training on Homebuilder Sales

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, users will be able to perform different type of transactions and operations specific to managing homebuilder sales in maestro *	<ul style="list-style-type: none"> Update configurations according to the decisions that were made; Purchase Offer; Customer Advance (optional); Mortgage Advance (optional); Interest Disbursement (optional); Mortgage Payment (optional); Cancel a Mortgage Disbursement (optional); Homebuilder Sales; Enter a Receipt; Cancel a Receipt; Print Cheques. 	<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 enter homebuilder sales in maestro* <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> Practice entering transactions. 	2h	<ul style="list-style-type: none"> Training document HOMEBS03. 	<p>Pilot</p> <p>Super user and/or users</p>

Unit HOMEBS05 - 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 to manage homebuilder sales.	<ul style="list-style-type: none"> List of Transactions; Mortgage Report; Buyer Deposit Analysis; Sales Balance Receivable; Project Profitability; Advance Control Report; Project Profitability - Detailed; Homenuilder Sales; Invoicing Report; List Generator. 	<ul style="list-style-type: none"> Review previous concepts and validate tasks completed as homework. Validation and configuration of homebuilder sales 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 HOMEBS06 - 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.	<ul style="list-style-type: none"> N/A 	<ul style="list-style-type: none"> N/A 		<ul style="list-style-type: none"> N/A 	Pilot

Unit HOMEBS07 - 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"> • Purchase Offer; • Homebuilder Sales. 	<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. 	2h		Pilot Users

Unit HOMEBS08 - 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 skills and knowledge to use and manage Homebuilder Sales 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 knowledge verification form.	Pilot