

THE MAESTRO* CATALOGUE

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What is the maestro* Catalogue?

The **maestro*** catalogue can be compared to an encyclopedia, in which are listed all elements that may be sold, purchased, or held in inventory. These are called catalogue items.

Much more than a list, the catalogue allows users to benefit from tons of information concerning each item; information about previous purchases, product history, in-stock quantity if these items are part of an inventory, and discounts given by suppliers. Furthermore, it can contain:

- rental tools, asset inventory items
- information about the last supplier(s) where the product was purchased, with the date and price
- supplier and manufacturer product code, and universal product code (UPC)
- replacements and substitutes
- conversion factors
- minimum and maximum stock to be held
- the product's location and localization, if applicable
- warranty information, if applicable
- default values to speed up the process
- etc.

The **maestro*** catalogue must also be dissociated from a catalogue exclusively for inventory item follow-ups or material pieces. Some items can be created for the rental of expertise hourly labour, or to facilitate the billing of various trades (a concrete former, a carpenter, a labourer, a fore(wo)man, etc.).



Work Order T&M Invoicing requires for all billable elements to be configured. The use of this invoice type suggests the use and the creation of catalogue items such as subcontract services, salaries, tools and equipment expenses, etc.

In sum, a catalogue can sometimes contain more than 50,000 items. That is why it is so important to establish an efficient coding system, to facilitate research. Furthermore, many modules and options refer or are linked to the catalogue, facilitating and speeding up the process of various transactions.

Why Use It?

There are multiple reasons to use the **maestro*** catalogue, such as the following benefits:

- **Have access to supplier and customer prices**

The establishment and/or recording of prices for different suppliers and clients allows to:

- speed up the invoicing process
- apply discounts by product family and/or type

- **Have access to individual item descriptions**

Once the item is saved in the **maestro*** catalogue, only the item code selection becomes necessary when the latter must be used for whatever reason. Its name is therefore always the same.

- **Profit from purchase and sales statistics**

The use of indexed item in the **maestro*** catalogue ensures that a wealth of information is available to the user, who can then generate various reports.

- **Assign codes to sold or used products**

Inventory management ensures, in part, that codes be assigned to items generated by the shopper.

Obviously, there are many other functions to the catalogue, such as unit conversion, which facilitates item management. Indeed, **maestro*** can systematically convert measure and quantity units to make sure they correspond to the ones the user wants, even if they are different than the supplier's. Furthermore, using products listed and coded in a catalogue allows users to know which products are being used for every project.

Finally, let's mention that catalogue items are available through **maestro*MOBILE** to, in part, generate service quotations, make material reservations or requisitions, perform inventory-project or inventory-site transfers, and place orders; another reason to use it!

The Classification and Coding of Items

The catalogue is a central database for various modules. It can be used for procurement, sales, material and tools inventories, in work orders, customer orders, quarry and concrete tickets, service calls, etc. This database is in some way **maestro***'s important central hub, hence the importance to thoroughly elaborate it. Indeed, given the number of items likely to appear in the catalogue, it is important to structure the latter in order to easily find the desired items.

Item Types, Categories, and Classification

Item classification must be done based on a well-considered logic. To do so, **maestro*** allows the creation of item types, categories, and classes to build a structured hierarchy and facilitate search.

Category definition constitutes the first available item classification level in **maestro***. In second part, types not only enable the regrouping of items with common characteristics or variables, they can also be used in different **maestro*** options, such as in **Define Customer Pricing** and **Define Supplier Pricing**, to identify to which items a discount will be applied for different customers.

It is then possible to assign a category to these items. These can be broken down into three levels.

Finally, categories can be combined, or not, with classes, allowing a tree-like structure as big as 10 levels. Let's also mention that a category's items can appear in more than one item class.

In short, item classification in **maestro*** can be compared to one we could find in a renovation centre or its website, for example. To find a product, we first select a department (seasonal, paint, plumbing, flooring, etc.), then a product type (slatted floor, tile, carpet, application and finition accessories, etc.). Then comes the selection of a specific category (subfloor membranes, application accessories, etc.).

| Item | Level Classification and Hierarchy Examples |
|---|--|
|  | <div style="margin-left: 20px;"> <ul style="list-style-type: none"> - Hardware - Plumbing - Electricity - Paint - ... + Lumberyard <p style="margin-left: 100px;">Level 1</p> </div> <div style="margin-left: 40px;"> <ul style="list-style-type: none"> - Shingle - Aggregate - Exterior Siding - ... + Wood <p style="margin-left: 100px;">Level 2</p> </div> <div style="margin-left: 60px;"> <ul style="list-style-type: none"> - Spruce - Cedar - ... + Treated Timber <p style="margin-left: 100px;">Level 3</p> </div> <div style="margin-left: 80px;"> <ul style="list-style-type: none"> - 2 x 16 - 2 x 12 - 2 x 10 <p style="margin-left: 100px;">Level 4</p> </div> |

| Item | Level Classification and Hierarchy Examples |
|---|--|
| | <div style="display: flex; align-items: center; justify-content: center;"> <div style="background-color: #cccccc; padding: 5px; margin-right: 20px;"> <p>- 2 x 8</p> <p>- 2 x 6</p> <p>+ 2 x 4</p> </div> <div style="background-color: #cccccc; padding: 5px; margin-right: 20px;"> <p>- Length 8ft</p> <p>- Length 10ft</p> <p>- Length 12ft</p> <p>- Length 16ft</p> </div> <div style="margin-left: 20px;"> <p>Level 5</p> </div> </div> |
|  | <ul style="list-style-type: none"> • Level 1 : Hardware • Level 2 : Bolt • Level 3 : Galvanized Steel • Level 4 : Hexagonal Head • Level 5 : Length 2 in. • Level 6 : Diameter 1/4 in. • Level 7 : Thread 1/4-20 |
|  | <ul style="list-style-type: none"> • Level 1 : Tools • Level 2 : Radial Arm Saw • Level 3 : 10 in. Diameter Blade • Level 4 : Carbide Teeth |

| Item | Level Classification and Hierarchy Examples |
|---|--|
|  | <ul style="list-style-type: none"> • Level 1 : Hardware • Level 2 : Screw • Level 3 : Steel • Level 4 : Wood screw • Level 5 : Countersunk Head • Level 6 : Length 1 in. 1/4 • Level 7 : Size: n° 8 |

Coding and Coding Strategies

Various codes can lead back to items in order to reference to and identify them:

- the product's universal code
- the manufacturer's code (a unique code)
- the supplier's product code - different for every supplier¹
- the **maestro*** code

When the time comes to determine the **maestro*** codification system, it is important to consult the company's key actors and make sure the system answers the needs of every department. It is better if the buyers, project managers, estimators, etc. agree from the start on which method to use. The best codification system will therefore be the one which answers to the needs of most in the company. Furthermore, many companies have already established a codification system based on the methods used for estimation.

Here are the most used codification system of Maestro customers, each having its advantages and disadvantages:

- **Maestro*** Code = the most frequently used supplier code
- **Maestro*** Code = the *Allpriser* or *Trade Service Group* product code
- **Maestro*** Code = a code established based on the item's classification in the catalogue or logic, such as TUYPVC20-34

Users have always become familiar with the catalogue at a quicker pace when product codes are short. However, the various search tools available in the **maestro*** catalogue compensate for the difficulties that could be caused by the use of more elaborate codes.



Though it is obviously better to correctly code items in **maestro*** from the start, one of the software's functionalities allows the mass modification of the latter, by merging inventory codes when the codification is found to be non-optimal. However, the quantity of transactions related to these merging

¹ **Maestro*** allows up to four supplier product codes to be assigned to a single item.



items has an incidence on the time needed to process the data; this operation can take quite a while.



Furthermore, **maestro*** allows the joining of items to create what we call an assembly, in the **Define Bill of Materials** option. Created assemblies are assigned a code containing various other codes, since they are made up of various pieces. It is then possible to use these assemblies in different **maestro*** options linked to the product catalogue, such as stock orders from catalogue, requisitions, work orders, manufacturing, procurement management, quotations, etc. If an assembly is defined for an item, it is the content of that assembly that will appear in the description upon transaction entry.

Editing the Catalogue

Once both the classification and codification defined, it is possible to create the catalogue in **maestro***. Although it is possible to manually add and configure items one by one, most users choose to use an *Excel* file import. This file can regroup preexisting lists or catalogue information, though many take advantage of the software change to revisit and rethink their data organization.

Catalogue Item Characteristics

Other than the various codes, types, categories, and classes, the **maestro*** catalogue ensures the recording of much information for each item.

Status

As previously mentioned, the **maestro*** catalogue is used for various reasons, hence the reason why it is so important to assign a status to each item to restrain their use to their specific application. Assigning a status to items allows to:

- limit their use to sales or purchases;
- make them available for sale AND purchase - making sure an average cost is calculated based on the history;
- directly account for their price in expense accounts;

- identify them as non-defined or general² items, and/or whether their sale price can be modified, and/or whether no average cost is calculated.
- identify whether they are composed of other catalogue products;
- identify if they are a "kit" that cannot be bought or kept in stock, but that is made up of catalogue products, therefore making the item only useful for sales³;
- determine if the quantities in stock are monitored and whether it is possible to generate statistics;
- etc.

Cost and Price Management

Other than the information concerning the cost of items for a maximum of four suppliers, when applicable, users also have fields enabling them to identify:

- The cost price (average item cost), or a fixed amount, which can be used as the unit price for inventory transactions and requisitions, if needed;
- The estimate price (default estimate price), which can be used for a selling price calculation using the discount table;
- The selling price (default selling price). A coding allows to indicate how this selling price must be calculated and which parameters, sources, and price increase percentages (including administration fees and profit, for example) are used;
- The list price (default list price).

Unit and Conversion

It goes without saying that a high proportion of items are managed by unit in the **maestro*** catalogue. However, the format, quantity, or volume of the various materials used and sold do not always correspond to the format, quantity, or volume of material bought. That is the case, for example, of filters, which are bought in boxes but used individually, freon bottles, which we only use in specific portions, rolls of fabric, for which the length used depends on the area that needs to be covered, etc. In sum, **maestro*** allows batch conversion of units, and vice-versa, as well as the modification of measurement units based on the different needs.



Maestro* also allows the identification of the number of item units included in one package for each supplier, when the item is managed by unit. However, it is impossible perform different valued conversions for a same product code; that is, selling an item, bought in a box of twelve, individually or in

²Assigning a general status to an item has an impact on other **maestro*** functions. Indeed, it is impossible to hold inventory for general items since there are no average costs, nor any specific data associated to them. This status should therefore be used in a context that justifies its use. For example, that is the case for door and window stain-glass, for which shapes and sizes are countless. It could also be the case for a service company's engines, when these are too numerous and varied.

³Let it be mentioned that it is possible to view and modify the "kit"'s components (or other catalogue products).



boxes of two, four, or six. To do so, separate product codes must be created for each value. The conversion unit must be constant and unique.

Location and Localization

It is possible to define an item's location and localization in **maestro***. Furthermore, various locations can be assigned to a same item; that is what we call a multilocation (one location is assigned as the main location). Multilocation is therefore synonymous of multiple physical locations where an item may be stored. These locations can be regular or mobile. Thus, a warehouse or a garage can be considered a location just the same as a technician's truck, or a container. By localization, we make reference to the shelf or aisle where the item is stored inside a location.

Barcodes

In addition to enabling the creation of labels, **maestro***'s barcode functionality added to a barcode reader can facilitate receipts of goods, inventory-project transfers, internal sales, and tool rental returns. Barcodes can also be used in the **maestro*MOBILE** interfaces that require the selection or identification of item codes: **Projects, Service, Field Work Orders, Receipt of Goods, Inventory-Project Transfer, and Inventory-Site Transfer**. The font type that must be used is 39 and it is recommended to use a laser printer with a resolution of at least 300 dpi.

Although it is inviting for all those managing an inventory to use barcodes, it is mandatory to have a well-established inventory management system; the use of barcodes and a scanner speeds up information entry but still requires that means and resources be implemented to ensure the accuracy of the data.



The **maestro*MOBILE** app is currently able to read barcodes of the following types: 39, 128, and 93.

Searching in the Catalogue

There are various ways to search for items in the **maestro*** catalogue. It is important to ponder on the preferred catalogue structure in order to optimize item search for the user. Breaking down the catalogue into categories and classes can, if applicable, speed up the search for specific items when comes the time to create a requisition or a stock order from catalogue.

The search modes available in the **maestro*** catalogue are the following:

- Using basic **maestro*** filters (to search in the whole catalogue);
- By category (limited, three-level search);

- By class (research mode allowing up to ten levels, but mandating the creation of a predefined hierarchical structure);
- Using SQL search, which allows the use of filters in different and predefined columns.



The SQL search method must not be confused with the **maestro*** platform or MSSQL version. The SQL search mode is more efficient than the standard search mode, and can be used with **maestro***'s Pervasive version. It makes reference to the SQL logic, which wants for special characters to be used as search conditions in a database (for example, \neq , $=$, $>$, \geq , etc.).



Using the **Estimating** module mandates the definition of classes, and therefore categories, to structure the catalogue's hierarchy; the latter results from the association between categories.

REMINDER

- The **maestro*** catalogue can be compared to an encyclopedia, in which are listed every item that can be sold, purchased, or held in inventory.
- Catalogue items are a very important **maestro*** component, since they are used in a wide range of options.
- Out of all the different advantages of using the **maestro*** catalogue, let's mention the possibility to have access to supplier and customer prices, individual item descriptions, purchase and sale statistics, and being able to assign codes to products that have been used and/or sold.
- Catalogue items can consist of possessions, but can also be subcontract services, salaries, equipment expenses, etc.
- **Maestro*** allows the creation of types that can afterwards be linked to items.
- The creation and use of classes and categories facilitates item search in the **maestro*** catalogue.
- In fact, there are many available search methods in **maestro***: using filters, by category, by classification, and using SQL search.
- It is mandatory to assign a **maestro*** code to catalogue items; different strategies are made available to users.
- **Maestro*** allows for different status' to be assigned to catalogue items to facilitate their management.
- Various information can be entered and configured for each item, such as unit conversion, different prices, product location, etc.
- It is possible to create labels with **maestro*** and facilitate the execution of certain operations by using barcodes and a barcode scanner.

• FOOD FOR THOUGHT - USING THE MAESTRO* CATALOGUE

- Does your company hold inventory?
- Are these items "consumable" (meaning, are they used and charged to a project) and/or tools used by employees?
- If they are tools, can they be billed and rented to a third party?
- Do you buy and perform the maintenance of equipment and capital assets?
- Do you bill the use of equipment in your projects?
- Does your company store supplier items?
- How is your catalogue structured (hierarchy)?
- How is item codification done?
- Are your inventory items already grouped by class and/or category?
- Do you review your inventory before treating a requisition?
- Are all purchases transferred to the inventory?
- Does a warehouseman perform your company's inventory reception?
- How are prices of purchased material determined?
- Do you use assembly or material invoices for purchased or manufactured items? Please describe the hierarchy.