

CATALOGUE

Lesson Plan - October 7, 2021

At the end of the *Catalogue* lesson, the customer and targeted users will be able to use the latter to list all sold, bought, and/or stored products with **maestro***. In addition, they will be able to access the prices by supplier and customer, unique item descriptions, and take advantage of purchase and sales statistics.

Unit CATA01- Preliminary Analysis

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 for using the maestro* catalogue, but also to agree on and establish the codification and classification of products.</p> <p><i>PREREQUISITES</i></p> <ul style="list-style-type: none">• <i>Security.</i> <p><i>OPTIONAL PREREQUISITES</i></p> <ul style="list-style-type: none">• <i>Projects;</i>• <i>General ledger;</i>• <i>Accounts Payable (AP).</i>	<ul style="list-style-type: none">• Analysis	<ul style="list-style-type: none">• Discussion on the current and future process of managing catalogue items (strengths and weaknesses);<ul style="list-style-type: none">• Codification of products;• Classification of products (grouping);• Update of the catalogue and identification of the employee in charge;• Update of the prices and identification of price types (net, discounted, etc.);• Possible imports (<i>Master, Allpriser,</i>	1h	<ul style="list-style-type: none">• Concept - The maestro* Catalogue	<p>Pilot</p> <p>Employee in charge of managing the catalogue</p>

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
		<p>QuébecRichelieu, EMCO, Expert Estimateur Windows);</p> <ul style="list-style-type: none"> Decision-making. <p>HOMEWORK</p> <ul style="list-style-type: none"> Reflect on the discussions. 			

Unit CATA02 - Configuration of Attributes

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this lesson, the customer and designated users will be able to define and configure the parameters necessary to create and import the maestro * catalogue.	<ul style="list-style-type: none"> Category Management; Define Item Types; Define Manufacturers; Define Item Classifications; Define Kind of Items; Define Units of Measure; Catalogue Management; Define Bill of Materials (optional). 	<ul style="list-style-type: none"> Review of previous concepts; Explanation and completion of the different databases in maestro*, linked to the catalogue management, according to the client's needs and the software's requirements, to automate data entry; Explanation of the categories used to search in the catalogue; Explanation of the types used for disocunts; Explanation of the different 	<p>3h</p> <p>+</p> <p>5 x 1h</p>	<ul style="list-style-type: none"> Training document CATA02¹ 	Pilot and/or Super Users

¹This training document is under development.

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
		search methods: <ul style="list-style-type: none"> • By category; • By classification; • By SQL search; • By level. <ul style="list-style-type: none"> • Product import using an <i>Excel</i> file or other. <i>HOMEWORK</i> <ul style="list-style-type: none"> • <i>Finalize the databases;</i> • <i>Think about the catalogue structure.</i> 			

Unit CATA03 - Catalogue Utilities

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this lesson, the customer and designated users will be able to define and use the different utilities of the maestro* catalogue.	<ul style="list-style-type: none"> • Catalogue import: <ul style="list-style-type: none"> • Allpriser; • Master; • Québec Richelieu; • EMCO. • Cleaning the catalogue; • Validate the deleted products; • Updating ElekNet Items in the maestro* Catalogue; • Merge Product Codes; 	<ul style="list-style-type: none"> • Review of previous concepts and validation of completed tasks as homework; • Demonstration of the use and effect of the different utility options. <i>HOMEWORK</i> <ul style="list-style-type: none"> • <i>Test the demonstrated options.</i> 	1h	<ul style="list-style-type: none"> • Training document CATA03^l • Integrated tests. 	Pilot and/or Super Users

^l This training document is under development.

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
	<ul style="list-style-type: none"> Reconstruct History Utility; Cost Adjustment. 				

Unit CATA04 - Price Configuration

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this lesson, the customer and designated users will be able to set different prices for catalogue products, according to the received information.	<ul style="list-style-type: none"> Catalogue Management; Supplier Discounts Table; Customer Discounts Table; Maintain Price Lists; Define Supplier Pricing (old method); Define Customer Pricing (old method). 	<ul style="list-style-type: none"> Review of previous concepts and validation of completed tasks as homework; User training on the management and maintenance of catalogue product prices and discounts, in accordance to the process established during the analysis; Validate the prices in the different transaction options and windows (orders, sales, etc.). <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> <i>Practice entering transactions to validate prices.</i> 	2h	<ul style="list-style-type: none"> Training document CATA04¹ 	Pilot and/or Super Users

¹This training document is under development.

Unit CATA05 - Analysis and Inquiry

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this lesson, the customer and identified user will be able to use maestro* 's analysis and report tools to find the information they need regarding catalogue items and prices.	<ul style="list-style-type: none"> Catalogue Inquiry; Pivotal Analysis by Identification; Average Cost Validation. 	<ul style="list-style-type: none"> Review of previous concepts and validation of completed tasks as homework; Validation of and configuration of reports and catalogue inquiry. <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> Validate data entered in maestro*. 	1h	<ul style="list-style-type: none"> Training document CATA05¹ 	Pilot Super Users Users

Unit CATA06 - Form Validation

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this lesson the customer will be able to use the standard maestro* forms defined to meet their needs.	<ul style="list-style-type: none"> Labels (if needed) 	<ul style="list-style-type: none"> Review of previous concepts and validation of completed tasks as homework; Validation and definition of changes to be made to the label forms, if required. <p><i>HOMEWORK</i></p>	To be Determined	<ul style="list-style-type: none"> Training document CATA06² 	Pilot

¹This training document is under development.

²This training document is under development.

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
		<ul style="list-style-type: none"> Validate the accuracy of the forms 			

Unit CATA07 - Tests and Validation

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
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.	<ul style="list-style-type: none"> Review and validation of prices; Presentation and review of the catalogue structure with the different internal departments. 	<ul style="list-style-type: none"> 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. <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> Complete Integrated Tests 	5h		Pilot Users

Unit CATA08 - Conclusion

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this lesson, the customer will have shown the necessary knowledge and skills to manage and use the maestro* catalogue.	<ul style="list-style-type: none">• Validate learnings;• Review the security settings applied to the module.	<ul style="list-style-type: none">• Preparation of the next training lessons:<ul style="list-style-type: none">• Resources;• Requisitions;• Stock Orders from Catalogue;• Inventory;• W/O Billing;• Concrete Tickets;• Quarry Tickets;• Customer Orders;• T&M Sales;• Service Calls;• Work Orders;• Quotations;• Preventive Maintenance;• Equipment Rental.	1h	Acquired competencies form - CATA^I	Pilot

^IThis training document is under development.