CONCRETE QUOTATIONS

Lesson Plan - May 15, 2023 version

By the end of the *Concrete Quotations* cours, the client and targeted users will be able to perform all the configurations and actions necessary to managing concrete quotations in **maestro***.

Unit CONCQUOT01 - Preliminary Analysis and Configuration

Date: Time: Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
The objective of this session is to clarify the needs, requirements, and conditions to using concrete quotations and set up the basic configurations that are linked to it in **maestro***. *PREREQUISITES* • *Security Management;* • *Project Management;* • *Customer Discounts Table;* • *Catalogue Management.* *OPTIONAL PREREQUISITE* • *Concrete Tickets*	• Analysis; • Configuration (**Concrete Tickets** module) : • General.	• Discuss the current and future process of concrete quotations (strengths and weaknesses); • Set up the required configurations for the implementation; • Decision-making. *HOMEWORK* • *Reflect on the discussions.*	15 min.	• Training document CONCQUOT01[1]	Pilot

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[1]This training document is under development.

Unit CONCQUOT02 - Configurations Linked to Concrete Tickets

Date: Time: Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this training session, the client and designated users will be able to set and configure the necessary parameters to manage concrete tickets in **maestro***.	• Concrete Formers and Transporters; • Form Management.	• Review previous concepts and validate tasks completed as homework; • Explanations and completion of the **maestro*** windows linked to concrete quotations, according to the client's needs and software requirements, to automate data entry. *HOMEWORK* • *Finalize data entry.*	30 min.	• Training document CONCQUOT02[1]	Pilot and/ou super users

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[1]This training document is under development.

Unit CONCQUOT03 - Concrete Quotation 101

Date: Time: Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this training session, the client and designated users will be able to perform the operations linked to the processes and management of service quotations in **maestro***.	• Update configurations according to the decisions that were made; • Concrete Quotations.	• 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 manage concrete quotations in **maestro***. *HOMEWORK* • *Practice entering transactions.*	1h	• Training document CONCQUOT03[1]	Pilot and/or super users

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[1]This training document is under development.

Unit CONCQUOT04 - Operational Training on Concrete Quotations

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, the client and designated users will be able to perform the operations linked to concrete quotation processes and management in **maestro***.	• Update configurations according to the decisions that were made; • Concrete Quotations.	• 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 manage concrete quotations in **maestro***. *HOMEWORK* • *Practice entering transactions.*	1h	• Training document CONCQUOT03[I]	Pilot Super user and/or users

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[I]This training document is under development.

Unit CONCQUOT05 - 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 on concrete quotations.	• Customer Statements by Quotation (after the billing of tickets).	• Review previous concepts and validate tasks completed as homework; • Validate and configure concrete quotation inquiry reports. *HOMEWORK* • *Validate data entered in* ***maestro****.	30 min.	• Training document CONCQUOT05[1]	Pilot Super user and/or users

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[1]This training document is under development.

Unit CONCQUOT06 - 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.	• Concrete Quotations Form; • Account Statement by Quotation.	• Review previous concepts and validate tasks completed as homework; • Adjust **maestro*** concrete quotation standard dorms to print preset forms with the client's image. *HOMEWORK* • *Validate the accuracy of the forms.*	To be Determined		Pilot

Unit CONCQUOT07 - 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.	• Customer Discounts Table.	• 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. *HOMEWORK* • *Complete Integrated Tests.*	30 min.		Pilot Users

Unit CONCQUOT08 - Conclusion

Date: Time: Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this lesson, the client will have shown they possess necessary knowledge and skills to manage accounts payable in **maestro***.	• Validate learnings; • Review the security settings applied to the module.	• Prepare the next training lessons: • Quarry Tickets.	15 min.	Acquired competencies form - CONCQUOT [1]	Pilot

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[1] This training document is under development.